Kind Tru

Organizational Health Assessment

ASSESSMENT REPORT

Organizational Health Report

Riverside Community Alliance

March 2, 2026

GENERATED WITH AI ASSISTANCE · SEE NARRATIVE DISCLAIMER

How to Read This Report

Executive Summary
The headline — what this assessment found

Synthesis
Cross-category patterns and what they mean

Discussion & Action
Questions for your board and next steps

Detail & Charts
Category deep-dives and visual summaries

Your Maturity Scale

Scores range from 1.0 to 4.0 across four maturity levels. No organization excels at everything — the value is in seeing the full picture and choosing where to focus.

Foundational	1.00–1.75	Starting to build — informal practices, often dependent on specific people
Emerging	1.76–2.50	Building structure — some systems in place but inconsistent
Established	2.51–3.25	Working well — documented practices, regularly reviewed
Advanced	3.26–4.00	Leading practice — continuous improvement, deeply embedded

Your Assessment Toolkit

This report is part of your KindTru assessment toolkit. You also received:

Board Facilitation Kit — a structured 90-minute retreat agenda built around your findings
Action Plan — prioritized next steps with 30/60/90 day milestones
Grant-Ready Language — narrative sections you can use in grant applications

Find these in your KindTru dashboard.

Executive Summary

2.6
OVERALL
Established

Categories: 18 Respondents: 7 March 2, 2026

Strengths: Mission and Purpose, Programs and Quality, Strategy and Planning

Priorities: Technology and Data, Fundraising, Digital Capacity

Scale: 1.0–1.75 Foundational · 1.76–2.50 Emerging · 2.51–3.25 Established · 3.26–4.00 Advanced

HEADLINE PATTERN

Strong Foundation. Mission, Governance, and Leadership are all Established or better — this organization has the core infrastructure to build on.

> After 15 years of building trust in Riverside's communities, your organization has something that cannot be manufactured quickly: a mission that is genuinely lived, not just stated

After 15 years of building trust in Riverside's communities, your organization has something that cannot be manufactured quickly: a mission that is genuinely lived, not just stated. The assessment confirms that your clarity of purpose, the quality of your programs, and your strategic thinking are real organizational assets. Your organization is strongest in Mission and Purpose, Programs and Quality, and Strategy and Planning. The areas where focused attention would make the biggest difference are Technology and Data, Fundraising, and Digital Capacity.

The overall picture is of an organization that knows where it is going but has not yet built all of the infrastructure to get there. Your strategy points in the right direction, and your programs deliver — but the tools and revenue systems needed to sustain that work are lagging. Across 18 categories assessed, this gap between planning capacity and financial and operational capacity is the central pattern. Notably, respondents in several areas — including Governance, Financial Health, and Fundraising — see the organization differently depending on where they sit, which itself is useful information as you prepare for a planning conversation.

If there is one place to focus in the next 90 days, it is Fundraising. Not because it scored lowest, but because stronger fundraising directly enables everything else your leadership has identified as a priority. Your team has the strategic clarity to make a compelling case to donors; what is needed now is a more systematic approach to cultivating and closing gifts from individual donors, who represent an underdeveloped channel given your existing revenue mix. Getting that right creates more room to invest in the technology and digital capacity your programs and staff need.

The category findings that follow provide detail on each of the 18 areas, including what the scores mean in practical terms and where the divergent perspectives are most worth exploring as a board. The facilitation kit and action plan that accompany this report are designed to take those findings directly into a structured board conversation — so that what you learn here translates into decisions, not just observations.

Top Strengths

1	Mission and Purpose	Advanced	3.60
2	Programs and Quality	Established	3.30
3	Strategy and Planning	Established	3.10

Priority Areas

1	Technology and Data	Emerging	1.90	
2	Fundraising	Emerging	2.00	*Perspectives vary
3	Digital Capacity	Emerging	2.10	
4	Advocacy and Policy	Emerging	2.20	
5	Financial Health	Emerging	2.30	*Perspectives vary

Cross-Category Patterns

Strong Foundation

Mission, Governance, and Leadership are all Established or better — this organization has the core infrastructure to build on.

Mission-Driven Alignment

Mission scores are Advanced and Strategy scores are Established or better, suggesting a well-aligned organization with clear direction.

Strategy Without Resources

Strategy and Planning scores are stronger than Financial Health, creating a risk that strategic plans outpace the organization's financial capacity to execute them.

Financial Fragility

Financial Health is Foundational or Emerging — the organization's financial position warrants priority attention before other initiatives can be sustained.

Systemic Perception Gap

Respondent perspectives diverge across multiple categories — this pattern suggests a significant gap in shared understanding of organizational reality that should be addressed before acting on report findings.

Planning–Learning Gap

Strategy scores are strong but Evaluation and Learning scores are low, suggesting the organization plans without measuring whether plans work.

SYNTHESIS

Across all 18 categories, here are the patterns that matter most. Read this before the category detail — it will orient you to what the findings mean together.

Cross-Category Analysis

Your organization has built something genuinely valuable over 15 years: a clear mission, strong programs, and a strategic orientation that holds together. What the full picture reveals, though, is that your capacity to sustain and grow that work is running on a narrower foundation than your programmatic strength suggests. Strong scores in mission, strategy, and community engagement sit alongside Emerging scores in financial health, fundraising, and the technology infrastructure that makes fundraising scalable. In plain terms, you know where you want to go and why — but the systems needed to fund that direction have not kept pace.

The divergence across four categories — governance, financial health, fundraising, and equity and inclusion — tells its own story. When respondents consistently read the same organization differently across that many areas, it usually means that some people are closer to the day-to-day operations and some are closer to the governing level, and neither has full visibility into what the other sees. That is not a problem to fix by choosing a side. It is useful information: before acting on this report's findings, your board and staff need a shared conversation about where the organization actually stands financially and what fundraising realistically requires.

The highest-return investment right now is fundraising capacity — not because it scores lowest, but because improving it directly enables everything else on your priority list. Better fundraising data systems make it easier to steward individual donors. Stronger individual donor relationships reduce dependence on any single grant. And when your evaluation practices improve, you will have the outcome data that makes both grant applications and donor conversations more compelling. A practical starting point within the next 90 days: identify who currently holds fundraising responsibility, document what systems they are working with, and determine what one operational change would let them spend more time building relationships and less time managing administrative friction.

Discussion Questions

Use these questions to guide a board-staff conversation about your assessment results. Each question is designed for 5–10 minutes of discussion.

MAKING SENSE

- **What does it tell us that our mission clarity and program quality are both strong, but the systems we need to sustain and measure that work — fundraising, technology, evaluation — are all still developing?**

  This question helps the group name the core tension in the findings: the organization's service work is real and valued, but the infrastructure behind it has not kept pace, which is precisely the challenge leadership identified going into this process.

- **What surprised you most about these results — and what felt completely expected?**

  Starting with surprise and recognition before moving to analysis helps the full group engage honestly with the data, and often surfaces assumptions people have been carrying quietly for a long time.

GOING DEEPER

- **In the areas where people around this table see things differently — particularly in governance, fundraising, and equity — what do you think each vantage point is seeing that the other might not be?**

  Several categories showed meaningful spread in how respondents assessed the organization; this question invites the group to treat that as useful information rather than something to paper over, without requiring anyone to defend or explain a particular answer.

- **What has gotten in the way of building stronger fundraising and financial practices over the past few years — and how much of that is about capacity, and how much is about choices we've made about where to spend our time and attention?**

  Financial Health and Fundraising are both Emerging, and the organization has named funding sustainability as its top challenge; this question helps distinguish between constraints the organization faces and patterns it has some agency to change.

MOVING FORWARD

- **We have a strong strategic plan and a real gap in our ability to measure whether it's working — what would it look like to close that gap in a way that doesn't add burden to a six-person staff?**

  The planning-learning gap is one of the clearest patterns in the findings, and for an organization this size, the obstacle is usually not will but bandwidth; framing the question around realistic fit makes action feel possible rather than aspirational.

- **If we could make one concrete commitment before we leave this room today — something specific enough that we could report back on it in 90 days — what would it be, and who needs to own it?**

  Retreats produce energy that dissipates quickly without a named owner and a short timeline; this question converts the conversation into accountability while letting the group choose the priority that feels most alive to them right now.

Action Recommendations

TIER 1 — DO THIS NOW

Your organization has the clarity and strategic grounding to move quickly on several fronts. These actions require no new spending and no new hires — only focused attention from the right people in the next 30 to 60 days.

The Executive Director should draft a basic data management policy within the next 60 days. The document does not need to be long. It should answer four questions in plain language: what data your organization collects, where it is stored, who can access it, and how long you keep it before deleting. A two-page internal policy reviewed and approved by the board is enough to close a meaningful governance gap and set the foundation for stronger technology practices going forward.

Within the same 60-day window, the Executive Director should schedule a dedicated board agenda item — 45 to 60 minutes — focused solely on financial health. Bring a one-page summary showing current reserves, the revenue-to-expense ratio by quarter over the past 12 months, and your three largest funding dependencies. The goal is not a financial review in the usual sense. It is a shared, documented acknowledgment of where the organization stands, so the board can make informed decisions during the planning cycle that prompted this assessment.

Whoever holds primary fundraising responsibility should pull a 12-month donor report before the end of the next 30 days. The report should show, for each donor who gave in the prior year, whether they gave again this year. You do not need a sophisticated system to do this — a spreadsheet is fine. The number you are looking for is your retention rate. Knowing it changes what you prioritize next.

The Executive Director should also block two hours in the next 30 days to inventory which staff members are currently using AI tools — for drafting, summarizing, translating, or anything else — and note which tools, how often, and for what tasks. No policy decision is required at this stage. The inventory itself is the action. You cannot govern something you have not yet described, and this step makes the governance conversation possible.

TIER 2 — CHOOSE YOUR APPROACH

Each of the following areas requires a real decision between two valid paths. Neither option is the default right answer — the right choice depends on your current capacity and where you want to focus over the next 90 days.

The challenge: Your organization does not yet have a written annual fundraising plan, and without one, the revenue diversification goal your leadership named as its top challenge will remain aspirational rather than operational.

Option A is to have whoever holds fundraising responsibility draft a lean, functional plan in the next 90 days — revenue targets by source, a month-by-month timeline, and named owners for each activity. It does not need to be polished. It needs to be specific enough that you can check progress at your next board meeting. This works well if the person doing the drafting has a clear enough picture of your donor base and grant pipeline to populate those categories without extensive research.

Option B is to treat the fundraising plan as a board-staff co-creation process, with a small working group that includes at least two board members and meets three times over 90 days to build the plan together. This takes longer and requires more coordination, but it produces a plan the board has ownership of — which matters given that board members are among your most important donor relationships and solicitation partners. Choose A if your board is not yet meaningfully engaged in fundraising conversations and you need a document in hand quickly to anchor those conversations. Choose B if two or more board members have already expressed readiness to take on fundraising roles and you want to formalize that now.

The challenge: Your digital communications — social media and email — are not yet functioning as a consistent channel for donor cultivation, community engagement, or program visibility, and spreading attention across multiple platforms is likely making this harder rather than easier.

Option A is to consolidate your social media presence to one platform and commit to a consistent posting cadence — two to three times per week — for the next 90 days, with content planned in monthly batches. Pair this with moving your email communications to a defined schedule, such as one newsletter per month and one appeal per quarter, using whatever platform you currently have. The goal is predictability over volume. This approach works if staff bandwidth for communications is limited and the priority is establishing a sustainable rhythm before expanding reach.

Option B is to begin with email infrastructure first — building a segmented list that separates donors, community members, and program participants — and treat social media as secondary until the email channel is functioning reliably. Email tends to drive more direct action per contact than social media, and for an organization at your funding stage, a well-maintained donor email list is a fundraising asset with measurable return. Choose A if you already have a functioning email list and need to shore up public visibility. Choose B if your email list is underdeveloped or unmanaged and you want to build the channel most directly connected to donor retention.

TIER 3 — EXPLORE THIS

Some challenges resist a clean action plan, not because the organization lacks will, but because the conditions that created them are layered and the solutions require tradeoffs that need to be named before they can be made. The following two areas fall into that category.

The challenge is the gap between your organization's strategic ambitions and the infrastructure required to realize them.

Your assessment shows genuine strength in mission clarity, program quality, and strategic planning. Those are not small things — many organizations your size lack one of the three. But the categories that scored lowest are precisely the ones that make strategy executable: technology and data systems, financial health, and fundraising infrastructure. The pattern this creates is one that many community-based organizations in your position recognize: you know where you want to go, and you can articulate it well, but the operational scaffolding needed to get there keeps requiring attention before the strategic work can move forward.

What makes this hard to address directly is that infrastructure investment competes with service delivery for the same limited budget and staff time — and in a mission-driven organization, service delivery usually wins. That is not a failure of discipline. It is a rational response to immediate community need. The difficulty is that funders who might support infrastructure often want to see it already in place before they invest, and the communities you serve need the services now. You cannot wait for perfect conditions to build the infrastructure, and you cannot scale without it.

A concrete first step would be to bring this specific tension to your board in a structured conversation — not a general discussion about capacity, but a focused question: What is the minimum infrastructure investment required over the next 18 months to make our fundraising and data systems functional enough to sustain the programs we already run? Frame it as a cost-of-doing-business question, not a growth question. Many California community foundations and regional grantmakers have explicit capacity-building grant programs designed for exactly this stage. The David and Lucile Packard Foundation, the James Irvine Foundation, and several Inland Empire community funders have historically supported organizational infrastructure for human services organizations in the $350K to $750K range. Identifying one capacity-building funding opportunity and making a dedicated application within your current planning cycle is a reachable first step that does not require resolving the full tension — it begins to resource the resolution.

The second challenge is how your organization handles data from the communities it serves, particularly in a context where 35 percent of the people you serve are navigating services in a language that is not their primary one.

Data practices in community-serving organizations are rarely examined until something goes wrong. But the question of what you collect, how you store it, who can see it, and how it is used is also a question about the relationship your organization has with the people it serves. For organizations working with immigrant and Spanish-speaking communities in California's current policy environment, that relationship carries weight that goes beyond compliance. The communities most in need of your services may also have the most reason to be cautious about how their information is used and shared.

What makes this hard to address directly is that it sits at the intersection of at least three separate organizational functions — data governance, equity practice, and communications — none of which have strong infrastructure at your current stage. Addressing it well requires coordination across those areas at a moment when each of them is individually still developing.

A concrete first step is to ask one grounding question in a staff conversation before the end of your current planning cycle: If a community member asked us what we do with the information they share with us, and they asked in Spanish, what would we tell them — and would we be able to explain it clearly? That question will surface both what your current practices actually are and whether your data policies, if you have them, are accessible to the people they are meant to protect. From there, you may want to consult with an organization like the California Community Foundation's equity and learning team, or connect with a peer organization in the Inland Empire that has done this work, to see what practical steps look like at your budget level. The data policy you build in Tier 1 is the right starting point — this exploration is about making sure that policy reflects your values, not just your compliance obligations.

WHAT'S NEXT

This report is one part of a KindTru assessment toolkit. The organization administrator can access:

Board Facilitation Kit — A structured 90-minute retreat agenda built around these findings
Action Plan — Prioritized next steps with 30/60/90 day milestones
Grant-Ready Language — Narrative sections ready for your next funding application

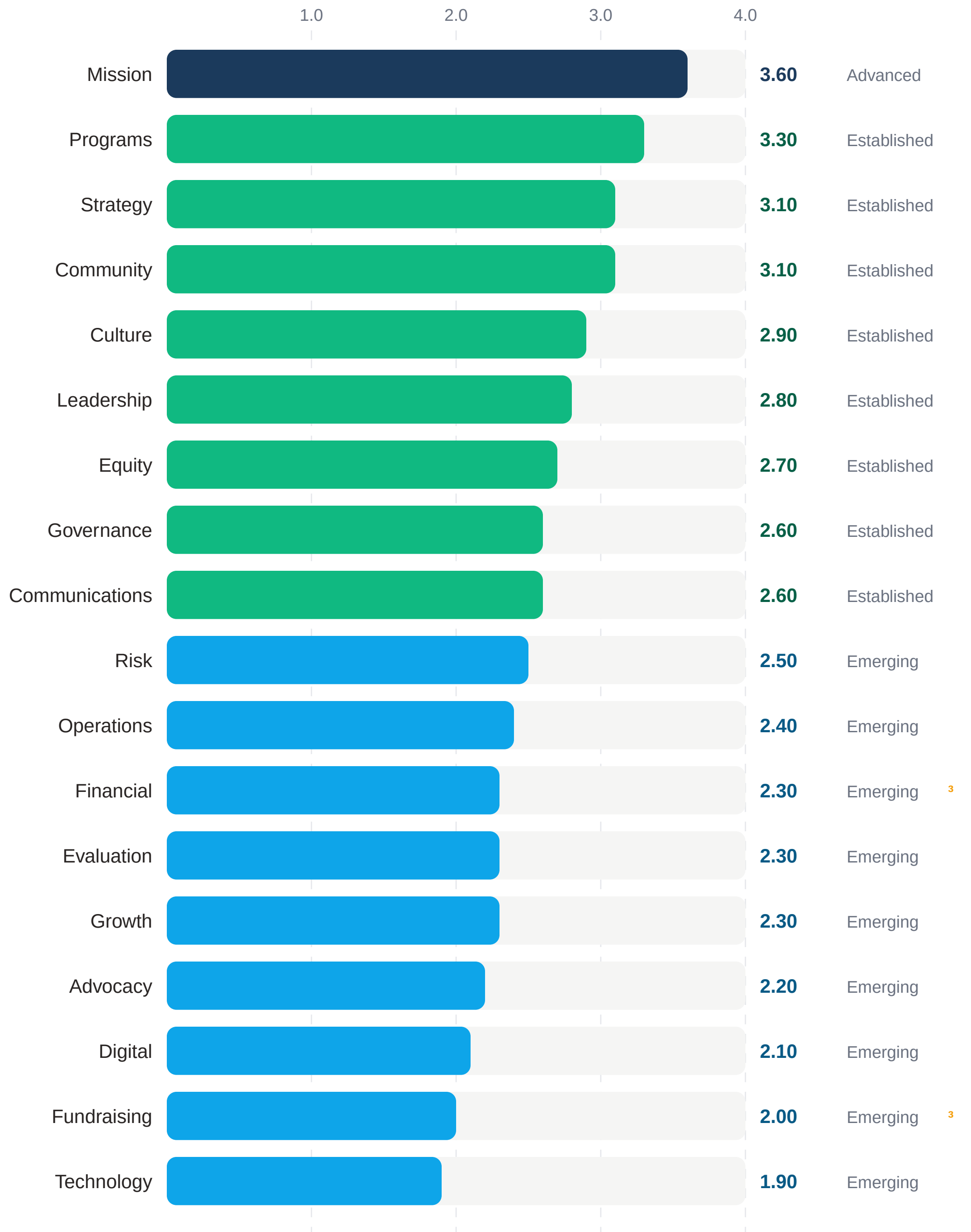
Ask your ED for access to the full toolkit at kindtru.vercel.app

REFERENCE & DETAIL

Charts and category-by-category interpretation for anyone who wants to go deeper into the data behind the findings above.

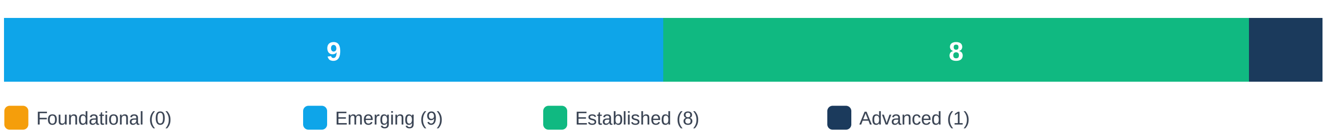
Assessment Overview

Category Scores



[3] Perspectives vary across respondents

Maturity Distribution



Category Findings

Mission and Purpose

Advanced

3.60/4.00

Fifteen years of community-rooted work has produced something genuinely difficult to build: a shared sense of purpose that guides real decisions, not just annual reports. Your mission is functioning as an active filter, and the absence of divergent perspectives here signals that the people closest to this work are reading the organization the same way.

Two practical steps are worth naming for sustaining this strength at your stage. First, the risk most likely to erode what you have built is not a sudden departure from mission but a gradual drift driven by funding pressure — the kind your top leadership challenge makes vivid. A written grant acceptance checklist, reviewed before any new funding opportunity advances, keeps that filter visible and applied consistently. Second, given that more than a third of the people you serve primarily speak Spanish, your storytelling and public communications deserve a periodic review specifically for how community members are framed — as protagonists with agency or as recipients of services. That review costs nothing but focused attention and reinforces the community legitimacy your score reflects.

- Before the next board meeting, draft a one-paragraph grant acceptance criterion that names at least two conditions under which the organization would decline funding — then bring it to the board for adoption within 60 days.
- Schedule a 30-minute review of your three most recent public communications (newsletter, social, funder report) and assess whether Spanish-speaking community members appear as people with voice and agency, not just as the population served.

Governance

Established

[3]Perspectives vary

2.60/4.00

Governance at your organization is functional and improving — fiduciary basics are in place, and the board is meaningfully engaged — but the 0.8-point spread among respondents is worth paying attention to. It suggests that what looks like strategic partnership from one vantage point can feel closer to rubber-stamping from another. That gap is not a sign of dysfunction; it is a signal that the board has not yet built shared language for what good governance actually looks like in practice here.

With three members under two years of tenure and four in the two-to-five-year window, your board is majority mid-formation. That tenure profile shapes everything: newer members may not yet feel the psychological safety to push back in the room, while longer-tenured members may have norms they have never had to make explicit. The question of where the board's role ends and the Executive Director's begins is especially worth naming out loud at this stage.

What is working is that deliberation is happening — this is not a board that simply ratifies what staff present. The score reflects genuine engagement with governance responsibilities.

- At the next board meeting, spend 20 minutes building a simple Decision Authority Matrix: list ten decisions made in the last year and mark each as board-led, staff-led, or shared. The conversation that surfaces is more valuable than the document.

- Within 90 days, design a structured first-90-days orientation for incoming board members that includes a governance education session, a one-on-one with the board chair, and an explicit conversation about candor norms — not just a binder of bylaws.

Leadership and Talent

Established

2.80/4.00

Strong mission alignment and a clear strategic direction only hold if the people carrying them have the support to stay. Leadership and talent at your organization reflect real investment — an annual ED evaluation, some professional development, reasonable clarity about roles — but there is still meaningful ground between where things stand and a system that actively develops the next generation of leaders and prevents the kind of attrition that sets organizations back.

At six FTE, a single departure does not just create a vacancy — it redistributes work across people who are already carrying a full load. That is not a reason for alarm, but it is a reason to treat succession and retention as board-level concerns rather than operational ones.

What is working is that the board is engaged enough to commission this assessment and ask hard questions — that kind of governance attention is the precondition for everything else in this category.

- Within 60 days, the board should confirm in writing that a succession plan exists covering both emergency leadership (who is authorized to act if the ED is unavailable tomorrow) and a planned leadership pathway — if neither document exists yet, drafting the emergency component takes less than two hours and removes real organizational exposure.
- Ask whoever holds fundraising and program responsibility to identify one emerging leader on staff who could take on a stretch assignment in the next six months — then budget a specific professional development opportunity for that person before the fiscal year closes. Making this visible signals that development is a practice, not a promise.

Strategy and Planning

Established

3.10/4.00

After 15 years, your organization has built something that many nonprofits never quite achieve: strategy that functions as a real decision-making tool rather than a document produced for funders and then shelved. A 6.8 on the planning orientation spectrum tells you that proactive thinking is genuinely shaping how you work — not just how you describe yourselves.

The strongest signal here is consistency. There are no divergent perspectives in this category, which means the people closest to operations and the people governing the organization share a common read on how strategy actually functions. That alignment is itself a strategic asset.

Moving from where you are to the next level is primarily about deepening habits you have already started: connecting environmental awareness to planning in a more continuous way, and making sure the budget visibly reflects strategic priorities — not just as a starting point, but as something the board returns to when decisions arise mid-year.

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Within the next planning cycle, bring your budget to a board meeting alongside your strategic priorities and ask one question together: does this budget make our top three priorities easier or harder to execute? Record the answer and any adjustments made.

- Before the end of the year, identify one program or activity in your current portfolio — not a bad program, but one whose fit with the mission has drifted — and have an honest board conversation about whether it still earns its place.

Financial Health

Emerging [3]Perspectives vary

2.30/4.00

Financial health is where the gap between knowing and doing tends to show up most clearly in organizations at your stage — and the spread among respondents here suggests that different people in your organization are seeing different parts of the picture. That is worth taking seriously, not because anyone is wrong, but because financial reality looks different depending on whether you are reviewing a quarterly report or watching cash flow day to day.

With a revenue mix that includes both government grants and foundation funding, you are likely navigating the particular tension of reimbursement timing alongside restricted fund management. California's government contracts often pay after services are delivered, which means unrestricted cash reserves are not just good practice — they are what keeps programs running between payments.

The board can read financial statements, and basic controls are in place — that is a real foundation. The work now is moving from receiving financial information to using it: dashboards that highlight what actually matters for decisions, and a reserve conversation that results in a written policy with a specific target.

- Ask your treasurer or bookkeeper to create a one-page cash flow summary that shows — separately — what is restricted and what is available to spend, and bring it to every board meeting for the next two quarters.
- At the next board meeting, set a reserve target as a board decision: agree on a specific dollar amount representing three months of operating expenses, write it into policy, and identify one concrete action the organization will take in the next six months to begin building toward it.
- Review your most recent Form 990 as a board together — not for compliance, but to ask whether the financial story it tells reflects how you would describe your organization to a major donor.

Fundraising

Emerging [3]Perspectives vary

2.00/4.00

Fundraising is the area where closing the gap will have the most direct effect on everything else your leadership has already identified as a priority. At a 4.2 on the fundraising approach spectrum, your organization is still closer to relationship-dependent than systematic — which means revenue depends heavily on who shows up and who remembers to ask, rather than on a process that works regardless of staff capacity or board energy in any given quarter.

The spread among respondents here is worth naming. What one part of your organization experiences as adequate — existing relationships, a grant calendar, some donor engagement — another part experiences as precarious and inconsistent. Both reads are accurate. Relationships are real assets; the question is whether they are being tended in a way that compounds over time.

Your organization already has the structural pieces in place: grants under active management, individual donors in the mix, and events generating some revenue. The gap is in the connective tissue — the systems that turn a list of contacts into a retention practice, and board members into active participants in growing that base.

- In the next 30 days, pull your donor list and calculate how many people who gave last year gave again this year. If you do not have that number, finding it is the first task — donor retention is the metric most likely to explain why individual giving feels flat even when relationships feel strong.
- Convene a 60-minute board conversation — not a committee report, a real conversation — about what role each member is willing to play in fundraising. Offer a spectrum from personal giving to making introductions to writing thank-you notes, and leave with each member having named one specific action they will take before the next meeting.
- This connects to what the assessment found in Financial Health — building a monthly giving program, even a small one, would directly address cash flow timing by creating predictable unrestricted revenue between grant payments.

Programs and Quality

Established

3.30/4.00

Fifteen years of direct service has produced something that does not happen by accident: programs designed around a clear theory of how change occurs, monitored against real quality standards, and reviewed with enough discipline to ask hard questions about what is and is not working. That is a meaningful achievement, and it shows in this score.

Your programs are functioning as mission made tangible — not just as activities the organization runs, but as deliberate expressions of what you believe it takes to strengthen families and neighborhoods. Systematic quality monitoring and longitudinal outcome tracking are in place, which means staff are not guessing about whether the work is landing.

A practical next step for sustaining this strength: within the next quarter, bring your program logic models into an annual review specifically designed to test the assumptions behind them — not just confirm the activities, but ask whether the causal logic still holds given what you have observed. A second step worth taking is conducting a barrier audit on at least one program where language access is a factor, examining whether design, communication, and delivery are reaching Spanish-speaking participants at the same depth as English-speaking ones. Strong programs are rarely static; the discipline that built this strength is the same discipline that keeps it.

Evaluation and Learning

Emerging

2.30/4.00

Evaluation is the place where good intentions either become learning or quietly disappear — and right now, your organization is doing the former only some of the time. Outcome data is being collected and occasionally reaches decision-making, but the path from data to action is informal enough that findings can be set aside when other pressures crowd in.

With 35 percent of the people you serve navigating services primarily in Spanish, how you collect data matters as much as what you collect. Surveys designed for English-speaking participants may produce systematically incomplete information about a significant portion of your community — not because those participants have less to say, but because the instruments were not built with them in mind.

The foundation is real: your team is measuring outcomes, not just outputs, and data does occasionally shape program decisions. That baseline is something many organizations at your stage have not yet built, and it is worth naming as genuine progress.

- In the next 60 days, identify one program where evaluation findings have already influenced a change, write down what that decision looked like, and use that example as the template for how findings get reviewed going forward — making an informal habit into a documented practice.
- Before the next board meeting, design a simple one-page outcome summary for that same program that board members can read in three minutes and respond to with informed questions, then test whether it prompts different conversation than what you typically have.
- Ask a community member who participated in a program in the past year to review one of your current data collection tools and tell you what questions feel confusing, invasive, or missing — a single conversation like this costs little and often reveals more than a full instrument redesign.

How your evaluation system matures will directly shape your ability to make the case for funding — a connection the assessment surfaces clearly in the Fundraising findings.

Community Engagement

Established

3.10/4.00

Community engagement is one of your clearest organizational strengths, and the score reflects something harder to build than a policy or a document: actual relationships, sustained over time, with the people and organizations your mission is built around. That kind of embedded presence in a community does not appear overnight, and fifteen years of consistent work in the greater Riverside area shows.

Your stakeholder relationships extend beyond service delivery into organizing and capacity building — which means your engagement model is already reaching toward genuine collaboration rather than stopping at the inform-and-report level that many human services organizations mistake for community connection.

Two steps would help sustain and deepen what you have built. First, within the next six months, conduct a missing stakeholder audit alongside community members — not a staff-generated list of who you engage, but a facilitated conversation that asks who is not at the table and why. Spanish-speaking community members who are not yet engaged are the most obvious starting point. Second, take stock of your current partnerships by applying a simple assessment to your top three or four collaborations: Is there a written agreement? Is the benefit mutual and clearly understood by both sides? When did you last check in on whether the partnership is still serving its original purpose? Writing down what you find will surface one or two conversations worth having before the year is out.

Equity and Inclusion

Established

[3]Perspectives vary

2.70/4.00

Fifteen years of direct service to Spanish-speaking families shapes what equity actually means for your organization — not as an abstract value but as a daily operational question about who is well-served and who is not. Your score signals that equity thinking has moved beyond good intentions and into genuine practice, which is real progress. Where the assessment surfaces something worth paying attention to is the 0.8-point spread among respondents: different people in your organization are seeing different parts of this picture, and that gap is itself useful information.

With 35 percent of the people you serve primarily speaking Spanish, language access is the most concrete equity lever you hold right now. Whether your current capacity fully meets that need — in intake, in programs, in communications — is worth examining honestly, because a gap there touches every other equity commitment you make.

What is working is that equity has moved from the margins to a visible organizational priority. The fact that respondents could assess it at all, and with this level of nuance, suggests equity is a live conversation rather than a dusty policy document.

- Within the next 60 days, pull your program outcome data and sort it by the demographic groups you serve — specifically to see whether Spanish-speaking participants are achieving outcomes at the same rate as English-speaking participants. If that data does not exist in usable form, making it collectable is the first task.
- Convene a 90-minute conversation between whoever designs programs and whoever delivers them, structured around one question: where in our service model does a language barrier most change what someone receives? Use what surfaces to identify one concrete change to make before the next planning cycle.
- Before your next board meeting, review your board recruitment criteria against the question of whether your current board composition requirements — time availability, professional background, meeting schedule — inadvertently favor people with more economic flexibility. Record what you find and bring it to the governance committee.

Culture and Communication

Established

2.90/4.00

What your score here reflects is an organization that has done the harder cultural work — not just writing values on a wall, but building conditions where people can actually work together well. At 2.90, this is one of your stronger categories, and it shows in how the assessment reads overall: the strategic coherence visible elsewhere in the report does not happen without a functional internal culture holding it together.

Your board's tenure spread is worth naming here. With three members under two years and two with more than five years of institutional memory, you have the classic mix where newer voices are still finding their footing. The ED–board chair relationship carries an outsized amount of the cultural load in an organization of this size, and how that relationship models candor and inclusion shapes what everyone else in the room feels permitted to do.

The clearest signal that something real has been built here is the absence of divergent perspectives in this category — what leadership experiences and what operations experiences are closely aligned, which at your size is not automatic.

- At your next board meeting, pilot a consent agenda for any items that are purely informational — try to free at least 40 percent of the meeting time for one strategic question that genuinely requires board judgment. Debrief the format at the end of the meeting and decide whether to make it standard.
- Design a short, identical set of four or five culture questions and ask both board members and staff to answer them independently before the end of this planning cycle. Compare the responses not to evaluate anyone but to see where perceptions align and where they diverge — that gap, wherever it appears, is your next conversation.

- Identify one significant operational change made in the past year and check explicitly whether it has actually stuck at the 30-, 60-, and 90-day marks. If it has not, trace why and use that finding to shape how you introduce the next change.

Risk and Compliance

Emerging

2.50/4.00

Risk management is the category most organizations at your stage treat as paperwork until the moment it is not — and your score suggests your organization is somewhere in the middle: past the point of ignoring it, not yet at the point of managing it systematically. The practical gap is not awareness, it is structure. Risk rarely surfaces at the board level unless something has already gone wrong.

Government funding in your revenue mix means some of your risk tolerance is set externally. An audit finding or a compliance gap does not just create administrative work — it can pause a funding relationship entirely. That asymmetry between the cost of a problem and the cost of preventing it is worth keeping visible for the board.

The foundation here is that basic compliance appears to be maintained and insurance is being reviewed, which means the organization is not starting from zero. That discipline, even without a formal risk framework, reflects real organizational care.

- Ask whoever holds financial and compliance responsibilities to prepare a single-page document for the board that answers three questions: What are our three biggest single points of failure if a key person departed tomorrow? When were our critical passwords and system access credentials last audited? How many months of operating expenses could we cover if our largest funding source paused for 60 days? Bring that document to the board within the next 45 days — not as a crisis signal but as a baseline.
- Add risk as a standing five-minute item on every board agenda, with a simple rotating prompt: last meeting it might be financial exposure, next meeting operational continuity, the one after that reputational or compliance. The goal is to make risk a normal governance conversation before something forces it.
- Locate your most recent Form 990 and check whether it is publicly posted on your website. If it is not, post it — this takes an afternoon and positions the organization as transparent to the donors, funders, and community members who may look for it before deciding to invest in your work.

Operations and Infrastructure

Emerging

2.40/4.00

The systems that hold your organization together day to day — how work gets handed off, how decisions get made when someone is out, how you track what needs doing — are built well enough to function, but not yet built well enough to survive disruption. At fifteen years in, that is worth naming clearly: longevity can mask fragility when the organization runs on the knowledge and habits of specific people rather than on documented process.

Your government grant relationships carry compliance expectations that most funders would describe as a floor, not a ceiling. The documentation discipline those contracts require is the same discipline that protects you when a key staff member leaves or when a funder asks for a program audit on short notice.

The encouraging signal is that your team is clearly getting things done — six people delivering a hybrid service model across direct services, organizing, and capacity building requires real coordination. The operational knowledge exists; the question is how much of it lives in people's heads rather than in forms, checklists, or written procedures that others can follow.

- Within the next 60 days, identify the three processes most dependent on a single person's knowledge — client intake, grant reporting, or financial approvals are common candidates — and have that person write a one-page summary of exactly what they do and when. This is the start of a procedures library, not a bureaucratic exercise.
- Before your next planning cycle, ask your board to spend 20 minutes at one meeting on a single question: if two staff members left in the same month, which programs would stop and why? The conversation itself reveals where the gaps are.
- Add a quarterly capacity check to the Executive Director's standing report to the board — one line comparing current staff commitments to available hours, so overload becomes visible before it becomes a retention problem.

Technology and Data

Emerging

1.90/4.00

The technology that runs your organization — your donor database, your case management or client tracking tools, your file storage, your email — is holding together, but the governance around it is thin. That matters because the families you serve include people who have often had little say in how institutions collect and use information about them. How your organization handles data from those community members is not just a compliance question; it is a values question.

With 35 percent of the people you serve primarily speaking Spanish, the equity dimension of your technology choices is concrete. If your client-facing systems, intake forms, or digital communications are English-only, the technology is working against your mission regardless of how well it functions on the backend.

Your team has begun the conversation — the assessment reflects some awareness of cybersecurity basics and data practices, and that starting point matters. Awareness without structure is what this stage looks like, and there is a clear path from here.

- In the next 30 days, have whoever manages your primary client data system answer three questions in writing: Where is the data stored? Who has access? What happens to it if that person leaves? Write down the answers. If you cannot answer all three, that gap is your first priority.
- Turn on multi-factor authentication for your email, donor database, and any cloud file storage this month. This is free or low-cost on most platforms and addresses the single most common source of nonprofit data breaches.
- Bring a 15-minute discussion to your next board meeting specifically on AI: ask whether any staff are currently using AI tools for drafts, research, or communications, and decide as a board whether you want a written use policy before the next fiscal year begins. Record the decision either way.

Digital Capacity

Emerging

2.10/4.00

Funders, partners, and potential donors are forming opinions about your organization before they ever speak with anyone on your team — and right now, your digital presence is not reliably making the case for you. A website that is current and a social media account that is occasionally active are a foundation, but they are not yet a strategy.

Because your work is community-rooted and your leadership named funding sustainability as the central challenge, this gap has a direct cost. Individual donors who learn about you through a community event or a referral will search your name before they give. What they find either builds confidence or introduces doubt.

Your team has clearly prioritized the work over the communication of the work, which is the right instinct for a mission-driven organization. The task now is modest: not a rebrand or a full redesign, but a reliable baseline that reflects the credibility you have actually earned.

- Assign one person — on staff or a consistent volunteer — ownership of the website for a 90-day trial, with one specific task: update the programs page, the impact numbers, and the leadership photo to reflect what is true today. Track whether it happens; if it does not, the barrier is role clarity, not effort.
- Choose one social media platform where your current donors and community partners are most likely to spend time, and let the other accounts go quiet with a pinned post directing people to your website. Depth on one channel will do more for your credibility than thin presence on three.
- Review your online giving page on a mobile phone today and count the number of taps required to complete a donation. If it takes more than three, identify the specific step creating friction and fix it before your next fundraising push. This connects directly to what the assessment found in Fundraising, where digital giving infrastructure is one of the clearest gaps between your current capacity and your revenue goals.

Communications and Brand

Established

2.60/4.00

Fifteen years of relationship-building in the greater Riverside area has given your organization something no marketing budget can buy: a reputation earned through consistent presence and real results. The Established score here reflects genuine progress — intentional brand management, a recognizable identity, and communications that reach multiple audiences. The next step is not building from scratch but sharpening what exists.

Your organization serves a community where 35% of the people you reach do not primarily speak English. How your story is told — and who gets to tell it — matters in ways that go beyond translation. Storytelling that centers the resilience and agency of Spanish-speaking families, rather than framing them as recipients of help, builds trust with the community and credibility with funders who are increasingly scrutinizing this.

The clearest strength here is that brand is already treated as something worth managing, not left to chance. That intentionality creates a real platform for the next level of work.

- Within the next 60 days, review your current fundraising and program materials for deficit framing — language that positions the community as helpless or your organization as rescuer — and identify two or three specific pieces to revise with language that emphasizes community strength and systemic context.
- Before your next board meeting, prepare a one-paragraph "ambassador brief" with three current talking points and a summary of your most recent impact results, so every board member can speak consistently about your work in their own networks without needing to improvise.
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Schedule a brief conversation in the next quarter with two or three community members you already trust to ask directly: when they describe your organization to neighbors or family, what do they say? Their words are your most honest brand audit.

Advocacy and Policy

Emerging

2.20/4.00

One of the most underused assets your organization already holds is direct knowledge of how policy lands on real families — and that knowledge has genuine influence with policymakers who rarely hear it. An Emerging score in this category does not mean advocacy is absent; it means the work happening informally has not yet been connected to a deliberate strategy with clear boundaries and board backing.

Your mission explicitly names community organizing alongside direct services and capacity building. That means advocacy is not a stretch from your core work — it is already embedded in your identity. The gap is typically not willingness but clarity: staff and board need shared language about what is legally permitted, what the organization's actual priorities are, and who is responsible for moving the work forward.

What is working is that the organizing thread in your mission gives you a credible foundation to build on, and coalition relationships common to organizations at your stage provide immediate infrastructure without requiring new investment.

- In the next 30 days, have whoever holds policy and program responsibility pull up IRS Form 5768 (the 501(h) election) and review it with your board chair — filing it removes legal ambiguity and gives your team a specific, quantified lobbying limit rather than an undefined fear.
- At your next board meeting, dedicate 20 minutes to identifying one policy issue — at the local or state level — where your direct service experience gives you something concrete to say, and decide as a board whether your organization will take a public position on it.
- Identify one coalition in the greater Riverside area that works on issues your mission touches, and ask your executive director to attend a single meeting before the next board cycle to assess whether formal participation would be a good use of your organization's voice.

Growth and Scaling

Emerging

2.30/4.00

Growth pressure is one of the most consistent realities for organizations at your budget level — every new grant opportunity, every conversation with an enthusiastic funder, carries an implicit invitation to expand. An Emerging score here suggests your organization has started to name growth as something that requires a decision, but has not yet built the habits and structures that make those decisions consistent and defensible.

Leadership named sustaining and diversifying the funding base as the top challenge, and growth decisions and funding decisions are tightly connected. Saying yes to a new program to secure a grant that funds it partially is a pattern that can leave an organization stretched thin and under-resourced in the programs where it already does strong work. Understanding the full cost of what you deliver — not just direct program costs but the staff time, administration, and overhead each program actually requires — is the analytical foundation that makes it possible to evaluate opportunities honestly before committing.

The groundwork is visible: your organization has articulated growth in its strategic plan and has begun the conversation at the board level about what you will and will not do. That is a meaningful starting point.

- Pick your two largest programs by participant volume and, within the next 90 days, have whoever tracks program finances calculate the full cost per participant for each — including a realistic share of indirect costs. Write that number down. It will change how you evaluate the next funding opportunity that comes through.
- Before accepting any new program or significant expansion in the next planning cycle, run it through four questions as a board: Does it fit our mission? Can we fund it fully? Do we have the operational capacity? What would we have to stop or reduce to do it well? Record the answers in writing before the vote.
- Schedule a 30-minute program portfolio review at your next board retreat using a simple two-axis grid — mission alignment on one side, financial contribution on the other — to see your current programs as a portfolio and identify anything worth examining more closely.

Organizational Profile

Every organization has a maturity profile — here is yours. Categories where you scored lower are not failures; they are the specific places growth has the highest leverage.

Included for reference — the synthesis and action sections above are where the decisions live.