FREE TEMPLATE

Organizational Self-Assessment Questionnaire

18 questions in six domains, every answer described in something you can see.

1. About your organization

Organization

Country and region

Program

Round (first / follow-up)

Date

Contact person (name, role)

2. Who answered

Name	Role	Domains answered (1 to 6)

3. How to answer

1. **Answer as a team.** The people who do the work: finance for finance, program staff for programs. Each person marks the answers alone first, then you agree them together.
2. **Describe today.** What happens now, not what is planned or written in a proposal.
3. **Pick the description that fits.** Choose what a visitor could see for themselves. Between two? Take the lower one and say why in the evidence column.
4. **"Not yet" is a good answer.** It is the most useful answer here: it shows where support should go first.
5. **Name the evidence.** A document, a date, an example. You do not need to send it now.
6. **Don't know? Say so.** Write "don't know" in the evidence column. That is useful to know too.

4. The four answers

1 Not yet

Not in place today. A normal answer: it shows where support should go first.

2 Starting

Started, done some of the time, or done by one or two people.

3 In place

Done routinely and written down. Someone could check it.

4 Embedded

Done routinely, reviewed and improved, and shared with others.

5. What we promise you

This questionnaire is for planning support together. It is kept apart from funding decisions and due diligence. We will send you a summary and discuss it with you. Your answers belong to you: you may share them with your other funders, so you are not asked the same questions twice.

Program contact (name, e-mail)

Please return it by

Summary and feedback meeting by

Who else will see your answers

Signed for the program team

Date

© 2026 Mourinho Solutions. All rights reserved. Advancer Template from the Advancer blog - Advancer.World - the program management platform.

FREE TEMPLATE

Organizational Self-Assessment Questionnaire

18 questions in six domains, every answer described in something you can see.

Domain 1. Governance and leadership

How decisions are made, and who checks them.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
1. In the last 12 months, how many board meetings had written minutes? *Show: the minutes*	☐ None yet, or no board	☐ One or two	☐ Three or more	☐ Three or more; decisions followed up next time	
2. When a board member or manager has a conflict of interest, what happens? *Show: the policy, the register*	☐ No rule yet; handled case by case	☐ A written policy, not used yet	☐ Conflicts declared and recorded	☐ Register reviewed by the board yearly	
3. Ask three staff, separately, to name this year's top priorities. What happens? *Show: the written priorities*	☐ No written priorities yet	☐ Written; staff name few of them	☐ Most staff name most of them	☐ All name them; reviewed every year	

Domain 2. Financial management

How money is planned, approved and checked.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
4. How often do you compare actual spending with the approved budget? *Show: the last budget report*	☐ No approved budget yet	☐ Once or twice a year	☐ Every month	☐ Monthly; differences explained to the board	
5. Who approves a payment before it is made? *Show: a recent payment voucher*	☐ The person who prepares it	☐ A second person, above a set amount	☐ A second person, every payment	☐ Every payment; bank access also split	
6. When were your accounts last audited or independently reviewed? *Show: the audit report*	☐ Never yet	☐ More than two years ago	☐ In the last two years	☐ Every year; findings acted on	

Domain 3. Program management

How work is planned and kept on track.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
7. How many of your current projects have a written work plan with dates and owners? *Show: one work plan*	☐ None yet	☐ Some of them	☐ All of them	☐ All; updated at a monthly review	
8. How are project risks tracked? *Show: a risk list*	☐ Dealt with when they happen	☐ Listed for some projects	☐ Listed for every project, each with an owner	☐ Reviewed monthly; actions recorded	
9. In your last project, how did the people you serve take part in its design? *Show: meeting notes*	☐ Not involved yet	☐ Informed of the plan	☐ Consulted; their input recorded	☐ Shared decisions and saw what changed	

Between two answers? Take the lower one and write why: a careful "Starting" with its evidence tells us more than a generous "In place". And remember: these answers are for planning support together. They do not decide funding.

© 2026 Mourinho Solutions. All rights reserved.

FREE TEMPLATE

Organizational Self-Assessment Questionnaire

18 questions in six domains, every answer described in something you can see.

Domain 4. MEAL

Whether you know what changes, and act on it.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
10. How many of your main indicators have a baseline value? *Show: the indicator table*	☐ None yet	☐ Some of them	☐ All of them	☐ All; checked against targets each quarter	
11. When someone in a community complains, what happens? *Show: the complaints log*	☐ No channel yet; only informal	☐ A channel exists; not logged	☐ Every complaint logged and answered	☐ Logged, answered, trends reported	
12. In the last 12 months, what changed in a program because of your data or an evaluation? *Show: the decision and its date*	☐ Nothing we can name yet	☐ Data discussed; nothing changed	☐ One change, written down	☐ Several changes, shared with staff	

Domain 5. People and safeguarding

How people are hired, and how everyone is kept safe.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
13. How many staff and volunteers have signed the code of conduct? *Show: the signed copies*	☐ No code of conduct yet	☐ Some staff	☐ All staff	☐ All staff and volunteers, renewed yearly	
14. If someone reported abuse by a staff member today, where would the report go? *Show: the reporting procedure*	☐ No defined route yet	☐ To the director, informally	☐ To a trained focal point, known channel	☐ Communities know the channel; cases reviewed	
15. When you hire, which checks do you make before the contract is signed? *Show: a recent hiring file*	☐ Interview only	☐ Interview and references	☐ References and safeguarding checks	☐ All checks, recorded for every hire	

Domain 6. Partnerships and advocacy

How you work with others, and who sees your results.

Question	1 Not yet	2 Starting	3 In place	4 Embedded	Evidence you can show
16. What share of last year's income came from your largest funder? *Show: the income statement*	☐ More than 75%	☐ 51 to 75%	☐ 26 to 50%	☐ 25% or less	
17. In the last 12 months, how did you take part in a network or coalition? *Show: notes, joint statements*	☐ Not a member yet	☐ Member; attended meetings	☐ Contributed to a joint activity	☐ Led or co-led a joint activity	
18. Who can see your results each year? *Show: the report or its link*	☐ Nobody outside yet	☐ Our funders only	☐ A public annual report	☐ Public report, discussed with communities	

In your own words

What are you proudest of in how your organization works today?

Where would support make the biggest difference in the next 12 months?

Which question was unclear, or hard to answer honestly? Tell us, so we can fix it.

© 2026 Mourinho Solutions. All rights reserved.