

OPERATIONS INFRASTRUCTURE CHECKLIST

Use this checklist to assess whether your nonprofit has the infrastructure needed to support growth, stability, and mission delivery.

1. Staffing & Human Resources

- ☐ Clear job descriptions for all roles
- ☐ Updated organizational chart with reporting lines
- ☐ Onboarding and offboarding processes in place
- ☐ Staff development plan and training budget
- ☐ Regular performance evaluations and feedback loops

2. Systems & Processes

- ☐ Documented SOPs (Standard Operating Procedures) for major tasks
- ☐ Internal communication system that works for all teams
- ☐ Centralized document and data management
- ☐ Regular staff meetings with clear agendas and follow-up

3. Facilities & Equipment

- ☐ Functional workspace (in-person or remote tools)
- ☐ Updated equipment and technology that meets current needs
- ☐ Physical or digital security measures in place

4. Data & Evaluation

- ☐ Program evaluation tools aligned with outcomes
- ☐ Systems for tracking service delivery and client impact
- ☐ Reporting protocols for internal and external stakeholders

5. Legal, Risk & Compliance

- ☐ Insurance coverage (general liability, D&O, etc.) reviewed annually
- ☐ Financial controls and dual signature policy in place
- ☐ Updated contracts, MOUs, and data agreements on file

6. Scalability Readiness

- ☐ Infrastructure aligned with 1-, 3-, and 5-year strategic goals
- ☐ Identified staffing and system gaps for future growth
- ☐ Leadership succession and contingency planning started