



BUILD BC-Yukon: Organizational Assessment Tool

This assessment is designed to help BIPOC-led grassroots organizations identify their **strengths, current capacity and priority areas for growth**. It supports you to articulate *why* BUILD funding is needed and *how* it will strengthen your organization's sustainability and community impact.

Many of the questions below align with **two IRCC-aligned outcomes**, also called the **Two Pillars of Growth**. Your responses will help you determine which pillar(s) your BUILD application should focus on.

The Two Pillars of Growth

- **Organizational Capacity Building (Foundation)**
Focuses on the internal systems that make your organization stable and funding-ready, such as governance, financial management, leadership, legal structure and operational systems.
- **Service Capacity Building (Impact)**
Focuses on strengthening how you design and deliver programs to your community, including staff capacity, accessibility, service quality and client outcomes.

Use this tool to:

- Reflect honestly on where your organization is today
- Identify 1–3 priority capacity gaps
- Align those gaps with your BUILD BC–Yukon funding request

How to use this tool

For each statement, select one:

- **Yes – in place**
- **In progress / partially in place**
- **Not yet**



Section 1: Organizational Foundation & Sustainability

(Primarily informs Organizational Capacity-focused projects)

1A. Legal Structure & Governance

- ☐ We have by-laws, a constitution, or guiding governance principles (formal or informal).
- ☐ We have clarity on our legal structure (society, non-profit, collective, emerging initiative).
- ☐ We have clear vision, mission and mandate statements.
- ☐ We have a written description of the community or populations we serve.
- ☐ We have an identified leadership or governance body (board, steering circle, collective, founder-led structure).

1B. Leadership Sustainability & Succession

- ☐ Leadership roles and responsibilities are clearly defined.
- ☐ Decision-making authority is documented or clearly understood.
- ☐ Institutional knowledge is shared beyond one individual.
- ☐ We have begun thinking about leadership transition or succession planning.
- ☐ We have strategies to reduce burnout and support leadership continuity.

1C. Financial Health & Stewardship

- ☐ We use a system (software or structured spreadsheets) to track income and expenses.
- ☐ We have basic internal financial controls (e.g., separation of duties, approval processes).
- ☐ We can produce a financial summary for the past 1–2 fiscal years.
- ☐ We have a process for budgeting and cash-flow planning.
- ☐ We are confident managing public funds responsibly.

1D. People & Operational Systems

- ☐ We have role descriptions for staff, contractors, or key volunteers.
- ☐ We have onboarding processes for new staff or volunteers.



- ☐ We have supervision, work-planning, or accountability practices.
- ☐ We use templates or tools for budgeting, reporting, or planning.
- ☐ We have basic operational infrastructure (technology, workspace, systems).

Section 2: Equity-Centered Impact & Service Delivery Capacity

(Primarily informs Service Delivery–linked capacity projects)

2A. Program Design & Planning

- ☐ We have a clear program or service area we want to strengthen.
- ☐ Our program has defined objectives, activities and intended outcomes.
- ☐ We have incorporated community or participant feedback into program design.
- ☐ We understand how this program addresses a real community need or gap.

2B. Lived Experience, Equity & Cultural Grounding

- ☐ People with lived experience are involved in program design or decision-making.
- ☐ Our leadership or staff reflect the communities we serve.
- ☐ Our services are culturally relevant and grounded in community realities.
- ☐ We consider accessibility (language, disability, cultural safety) in our work.
- ☐ We apply equity-centered approaches (e.g., anti-racism, GBA+-informed thinking).

2C. Service Delivery & Accessibility

- ☐ Our services are accessible through in-person, virtual, or hybrid approaches as appropriate.
- ☐ We have a way to manage client or participant registration.
- ☐ We have systems for tracking participation or attendance.
- ☐ We have processes for program communications (outreach, website, social media).



2D. Systems Navigation & Rights Education

- ☐ We support community members to understand and navigate public systems (health, education, legal, social services).
- ☐ We provide rights education or self-advocacy support.
- ☐ We have referral pathways to trusted partner organizations.
- ☐ We follow up with clients where appropriate.

Section 3: Monitoring, Data & Accountability

(Supports BOTH Pillars: *Identifies needs for tools, systems and reporting readiness*)

3A. Data Systems & Learning

- ☐ We have a system to track participants, activities, or services.
- ☐ We can analyze basic trends (e.g., number served, frequency, outcomes).
- ☐ We use data to improve programs or decision-making.

3B. Performance Measurement & Reporting

- ☐ We have experience writing narrative or activity reports for funders.
- ☐ We have basic indicators to measure progress or outcomes.
- ☐ We collect participant or community feedback (surveys, conversations, testimonials).

3C. Data Ethics, Privacy & Risk Awareness

- ☐ We have practices to protect client confidentiality and privacy.
- ☐ We understand consent and ethical data use.
- ☐ We are aware of risks related to working with vulnerable communities.

3D. Funding Readiness

- ☐ We can manage grant agreements, reporting timelines and compliance requirements.



- ☐ We have systems to track project expenses separately.
- ☐ We have the capacity to manage cash flow for funded projects.

Section 4: Partnerships, Strategy & Future Readiness

(Supports BOTH Pillars)

4A. Partnerships & Collaboration

- ☐ We collaborate with other community organizations or networks.
- ☐ We have partners who could provide references or letters of support.
- ☐ We understand how our work fits within the broader service ecosystem.

4B. Strategic Positioning

- ☐ We have clarity on how BUILD funding supports long-term sustainability.
- ☐ We are intentionally building capacity for future funding opportunities (e.g., IRCC, provincial programs).
- ☐ We have a shared vision for growth over the next 1–3 years.



Turning Assessment Results into a BUILD Application

1. Identify Capacity Gaps

Review statements marked *Not yet* or *In progress*.

2. Prioritize 1–3 Areas

Choose the gaps that most limit your organization’s effectiveness or sustainability.

3. Align With BUILD Priorities

Link your selected gaps to eligible capacity-building areas (governance, systems, leadership, equity-centered practices).

4. Use Gaps to Justify Budget Requests

Each budget line should clearly connect back to a gap identified in this assessment.

Example: “We identified gaps in financial systems (*Organizational Capacity*). We are requesting funding for accounting software and financial training to strengthen our reporting and funding readiness.”

Priority Area	Current Gap	Which pillar does this support?	Proposed Capacity-Building Activity	BUILD Funding Area	Estimated Cost

(Please feel free to use this table more than once.)