



BCAAFC | BC Association of
Aboriginal Friendship Centres

Friendship Centre Organizational Health Self-Evaluation 2026-2027

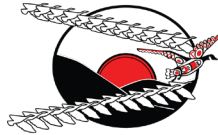
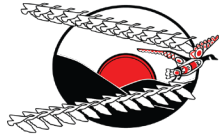


Table of Contents

.....	1
BC Friendship Centre Organizational Health Assessment Self-Evaluation	
Introduction	3
Board of Directors Checklist	4
Human Resources Management Checklist	9
Executive Director Checklist	11
Financial Management Checklist	12
Program Management Checklist	15
Contract Management Checklist	16
Volunteer Management Checklist	17
Facilities Checklist	19



BC Friendship Centre Organizational Health Assessment Self-Evaluation Introduction

This self evaluation tool is designed for Friendship Centres to review each section and ensure all of their foundational policies, procedures and practices are strong. Each step and document checked in this form work together to build the foundations on which a strong, stable Friendship Centre is built.

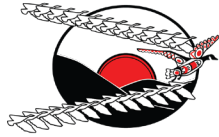
Strong foundations are vital to ensuring the stability and growth of an organization. Policies and Procedures form the foundation at each Friendship Centre, while Cultural practices and Community engagement breathe life into the organization.

We hope that this self-evaluation tool assists your Friendship Centre in not only identifying areas for improvement but also highlighting areas that are bringing strength to your organization.

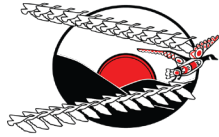


Board of Directors Checklist

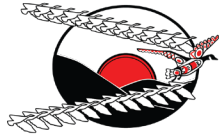
Board Orientation of New Members	Yes	No	Comments
Is there Board orientation annually, and as needed?			
Does Board orientation include training on bylaws and constitution?			
Is there a board orientation manual/presentation on file that is reviewed and updated?			
Does the Board sign a confidentiality agreement, code of conduct, roles and responsibilities annually?			
Do all Board members update their Criminal Record Check regularly and submit to the Board President for review, and Executive Director for safe keeping?			
Is there a clear policy about the different roles and responsibilities for the Board duties (implement and oversee policy and guide the organization) and Executive Director (the liaison between Board-Staff; guide the operational activities; delegate to employees)?			
Board Members	Yes	No	Comments
Is the Board composed of primarily urban Indigenous people (minimum of 50% + 1) with a diverse range of skills, gender and age?			



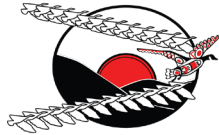
Do Board members understand the organization's purpose and, if applicable, the mission, vision and values?			
Does the Board Treasurer review funding contribution agreements as required?			
Are Board members involved in the hiring, support and annual evaluation of the Executive Director?			
Is the Board invited to participate in the organization's events or represent the organization in the community?			
Is there an annual recruitment of new Board members and election of the Board of Directors?			
Board Meetings	Yes	No	Comments
Are Board meetings standing meetings or scheduled monthly at least 6 months in advance by the President or Secretary, distributing the agenda in advance to all Board members?			
Are the ED and Finance reports, and prior meeting minutes sent in advance to all Board members?			
Are all minutes of meetings reviewed and approved at the next meeting?			
Does the Board receive a monthly ED and Finance report on programs, finances, and committees?			
Does the Board approve all significant budget changes quarterly, or as they arise?			



Do monthly meetings have quorum, are well attended and full Board participation in discussions?			
Are there standing Board committees (Board Executive, finance, personnel, nominations committee etc.)?			
Have there been any governance challenges that affected your organization in the past?			
Are Board terms staggered to avoid full turnover of Directors annually?			
Is there high turnover in Board positions outside of elections?			
Annual General Meetings	Yes	No	Comments
Do notices for the AGM align with bylaws and are they sent within the required timelines?			
Does the organization meet annual filing requirements and deadlines detailed under the BC Societies Act?			
Is the agenda distributed in advance to all Members and Board Members?			
Are culturally appropriate opening and closing prayers held?			
Members	Yes	No	Comments
Does the organization maintain an updated membership list?			
Does the organization have a policy and application form for new member recruitment and approval process?			
Is the Annual General Meeting well attended by Members?			



Suggested Board Resources:	Yes	No	Comments
Board Manual should include:			
<ul style="list-style-type: none"> Organization history, mission, vision and values 			
<ul style="list-style-type: none"> Organization constitution and by-laws 			
<ul style="list-style-type: none"> Legal duties, responsibilities, and liability of Board members 			
<ul style="list-style-type: none"> List of Board members and their roles 			
<ul style="list-style-type: none"> Contact information for Board members and key staff 			
<ul style="list-style-type: none"> All policies: personnel, financial etc. 			
<ul style="list-style-type: none"> Board expense claim forms and policy 			
<ul style="list-style-type: none"> Current organizational charts for employees 			
<ul style="list-style-type: none"> Lists of committees, with terms of reference 			
<ul style="list-style-type: none"> Most recent annual report 			
<ul style="list-style-type: none"> Most recent consolidated audited financial statements 			
<ul style="list-style-type: none"> Current fiscal budgets for all programs, monthly variance reports 			
<ul style="list-style-type: none"> Binder at the organization with complete Board and committee meetings 			
<ul style="list-style-type: none"> Strategic planning documents or other organizational planning tools if available 			



<ul style="list-style-type: none"> • Results of recent organization/program evaluations/surveys etc. if available 			
<ul style="list-style-type: none"> • Annual programs statistics and summaries of programs offered 			
<ul style="list-style-type: none"> • Organization newsletter if available 			
<ul style="list-style-type: none"> • Copies of relevant legislation: Provincial/Territorial society or corporation act; employment standards act etc. 			



Human Resources Management Checklist

Indicators	Yes	No	Comments
Is there a personnel policies and procedures manual that is reviewed annually, and bi-annually by an Employment Lawyer?			
Does this manual outline recruitment, orientation, hiring, remuneration, benefits, progressive discipline, and termination, in line with provincial and federal employment and human rights legislation and regulations?			
Does your organization primarily employ urban Indigenous employees when possible?			
Are all employees qualified for their position?			
Are vacant positions posted in a timely manner and recruited with qualified persons to avoid disruption to operations?			
Is there an organizational chart that outlines accountability/reporting relationships?			
Do all employees have a copy of their own job description?			
Do you have employment contracts for all staff?			
Do all new staff sign employment contracts that have been reviewed by an Employment Lawyer?			



Do all employees receive an annual performance evaluation?			
Do employees receive ongoing professional development and training?			
Do employees sign an oath of confidentiality and code of ethics?			
Do employees update their Criminal Records Check and Vulnerable Sector Check annually?			
Do you have a checklist for maintaining personnel file documentation?			
Do all employees and contractors have up to date files?			
Are confidential personnel and client files and records in safe keeping?			
Suggested HR Resources:			
• Employee orientation manual			
• New employee info and payroll form			
• Job description			
• Employment contract			
• Tour of the organization			
• Workplace safety orientation			
• Organizational chart			
• Signed acknowledgement from employee for receipt of personnel and finance policies			
• Oath of confidentiality			
• Conflict of interest and nepotism			
• Employee benefits and probation period			
• Performance reviews			



• Staff development			
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Executive Director Checklist

Indicators	Yes	No	Comments
Is the ED adequately trained in all policies and procedures (i.e. HR, Finance, etc.)?			
Does the ED receive annual performance reviews by the Board of Directors?			



Financial Management Checklist

Indicators	Yes	No	Comments
Does your organization have a financial policy, and is it reviewed annually?			
Do the financial systems comply with financial practices for non-profit organizations?			
Is the finance person qualified for their role?			
Is the auditor a certified chartered accountant and approved by the membership annually?			
Do members review and formally approve the annual audited financial statements?			
For each contract (new and existing) is a budget done prior to any work being done, clearly laying out costs/timelines?			
Is each program budget reviewed quarterly to ensure financial responsibility?			
Is each team lead or senior manager briefed on their financial obligations, timelines for each applicable contract? And review those budgets monthly/quarterly?			
Is the Finance Committee (if applicable) a standing committee of the Board, chaired by the Treasurer?			
Is training/orientation on financial statements provided for all Board members and appropriate employees?			



Are Board members confident in reviewing monthly financial statements (budgets, income statements, balance sheets)?			
Does the Board approve Centre budgets annually and any significant changes throughout the fiscal year?			
Do all cheques and contracts have two authorized signatures, as per signing authority guidelines laid out in the finance policy?			
Does the Finance Manager regularly report to the ED and Board?			
The organization's assets are adequately insured: fire, theft, general liability, Directors and Officers liability, cyber-security protection, etc.			
The organization has established a plan identifying actions to take in the event of a reduction or loss in funding.			
Financial reports are submitted as required to funders and/or government agencies.			
Suggested Financial Resources:			
• Finance Policies should include:			
• Roles and Responsibilities			
• Budget preparation and controls			
• Expenditure controls			
• Credit Card management			
• Authorized signatories			
• Payment Requisition policy and documentation			
• Spending Limits and Authority			



• Financial Systems and Reporting			
• Cash vs. Accrual accounting			
• Management of assets and liabilities			
• Monthly cash flow and variance budgets			
• Monthly bank reconciliations			
• Inventory of capital assets			
• Capital fund and investment management			
• Contracted services			
• Petty cash monitoring and accounting			
• Authorized travel and reconciliations			
• Donations			
• Reimbursements			
• Employee Payroll management			
• Employee Benefits maintenance			
• Employee timesheets reconciling overtime and holidays			
• CCRA - income tax and remittance			
• Audit preparation and completion			



Program Management Checklist

Indicators	Yes	No	Comments
All programs and services delivered are developed based on the needs of the urban Indigenous population			
Programs are culturally appropriate			
The Board and Management Team are familiar with agreements and reporting outcomes			
Programs meet objectives and outcomes, and reporting is satisfactory to funders			
Is each responsible staff member aware of the reporting and data collection required for the projects/programs they work in?			
Employees are able to record daily statistics of direct services and summarize annually			
Does the Centre collect and review statistical information at the team lead/manager level monthly?			
Do all managers know of program reporting deadlines and internal procedures to allow for adequate time to complete reporting deliverables and management review prior to submission of reporting to funders?			
Programs are promoted to the community			
Programs promote partnerships and community connection			



Contract Management Checklist

Indicators	Yes	No	Comments
Does the ED, Finance and GM have a list of all contracts run through the Centre including funder, amount, and reporting requirements?			
Is all reporting submitted to senior management in time to allow review prior to submission to funder?			
Are accurate statistics being collected centre wide to ensure strong reporting?			
Is each contract reviewed quarterly to ensure all recipient obligations are being met?			
Are new staff briefed on program duties as they relate to their applicable contract(s)?			
Are all payments reported to both the ED and Finance Manager as they come in?			
Are monthly budget meetings being held by applicable senior management to ensure Centre is on track with all funding obligations?			
Are contracts accessible, secured and is a file management system in place?			



Volunteer Management Checklist

Indicators	Yes	No	Comments
Do you have a volunteer application form?			
Does the policy manual include a section on volunteers, and is it reviewed annually?			
Does the policy include recruitment, screening, reimbursement of expenses, relationship with staff and participants, code of conduct, confidentiality, etc.?			
Does the recruitment policy respect, encourage and represent the diversity of the community?			
Is there initial orientation and ongoing training for volunteers?			
Do you ask volunteers for resumes or list past experience to ensure a good fit?			
Do volunteers update their Criminal Records Check and Vulnerable Sector Check annually?			
Job descriptions exist for all volunteer positions in the organization.			



Volunteers are aware of and understand their responsibilities and acknowledge acceptance of the job description in writing.			
The organization maintains confidential volunteer records.			



Facilities Checklist

Indicators	Yes	No	Comments
Is the facility adequate to deliver the programs and services listed in the operational plan?			
How does the organization ensure privacy for clients when required/requested?			
Is there an operational plan for the range of programming (i.e. to facilitate drop-in, meet the needs of high-risk clients and safety of families and employees, etc.)			
Is the building accessible for Elders and those with mobility issues?			
Is all the equipment maintained and safe? How? (i.e. monthly/bi-weekly check of fitness equipment)			
Is a clean and healthy environment maintained (janitorial, waste removal, etc.)?			
Are rental/mortgage documents readily available?			
Are all insurance policies up to date with adequate coverage for all buildings or properties?			
Are there safety measures in place such as security cameras, security guards/patrols, evacuation procedures, etc.?			