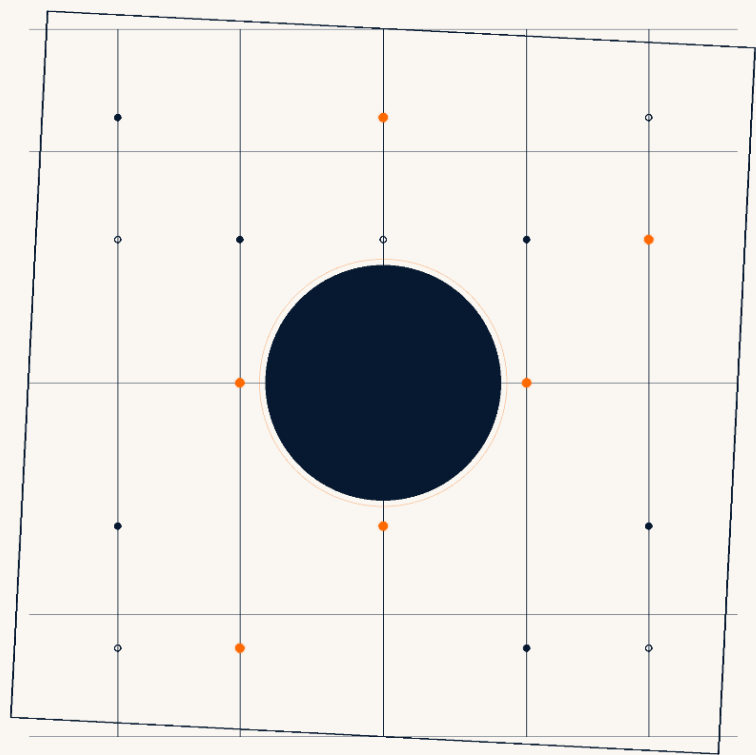


The Operational Maturity Self-Assessment



Scale Impact

Operational Excellence ■ Strategic Clarity ■ Lasting Impact

Six dimensions, several viewpoints

Every organisation looks different depending on where you stand in it. The view from finance is not the view from delivery, and neither is quite the view from the board. That difference is not a problem to iron out - it is useful information, and it is usually invisible until you ask several people the same questions.

This assessment benchmarks an organisation across the six dimensions of operational maturity that matter most for mission-led organisations. It takes about forty minutes, and is designed to be completed by several people from different parts of the organisation, independently, and then compared.

How to use it

For each statement, score from 1 to 5 using the scale below. Score how things actually work, not how they are supposed to work.

Fill it in on your own first. Do not confer - where people disagree is exactly what makes this worth doing. There is space under each dimension to say what is behind your score; that context is usually more valuable than the number.

Answer for the organisation as a whole, not only for your corner of it. Where you can genuinely only speak for your own team, site or service, score what you actually see and say so in the comment box - knowing whose view a score represents is useful, not a failure to answer.

Score	Level	What it looks like
1	Ad hoc	It depends entirely on individuals. Nothing is written down; if the key person left, it would leave with them.
2	Emerging	Some structure exists but it's inconsistent - held together by spreadsheets and goodwill.
3	Defined	There's a documented way of doing this and most people follow it most of the time.
4	Managed	It works reliably, is reviewed regularly, and the team owns it without leadership chasing.
5	Optimising	It actively makes everyone better. You measure it, learn from it, and improve it as you grow.

About you

Role	Team or department	Date
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01 Governance & decision-making

How decisions get made, delegated and communicated.

Statement	Score (1–5)
It's clear which decisions the board makes, which leadership makes, and which teams make themselves.	
Decisions are made at a predictable rhythm - not only when something breaks.	
When a decision is made, the people affected reliably hear about it, once, clearly.	
The organisation could make a significant decision well, even if the founder or CEO were away for a month.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

02 Financial management & sustainability

Budgeting, reporting, income diversification and resilience.

Statement	Score (1–5)
Leadership sees an accurate financial picture - cash, committed income, pipeline - at least monthly.	
Budgets are owned by the people who spend them, not just by whoever holds the spreadsheet.	
You know your true cost of delivery well enough to price or bid with confidence.	
The loss of your single largest funder or client would be survivable with the reserves and plan you have today.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

03 People, culture & capability

Team capacity, skills, culture and leadership pipeline.

Statement	Score (1–5)
Roles and responsibilities are clear enough that work rarely falls between two people.	
New starters become productive through an actual induction, not by absorbing knowledge from whoever sits nearest.	
Workload strain is visible early through your ways of working - not only when someone burns out.	
People change how they work willingly, because their own goals are built into the change.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

04 Systems, tools & data

Your technology stack, data infrastructure and workflows.

Statement	Score (1–5)
There is one place where the current version of any important document or record lives - and everyone knows where.	
Your core tools talk to each other; re-typing the same information twice is the exception.	
Someone new could find what they need without asking three people first.	
You could produce the evidence a funder or auditor asked for within a day, not a week.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

05 Impact measurement & learning

How you measure, report and learn from your impact.

Statement	Score (1–5)
You collect impact data as part of everyday delivery, not as a scramble before reporting deadlines.	
Your impact claims are backed by records rigorous enough to withstand scrutiny.	
Impact data actually changes decisions - what you do more of, less of, or differently.	
You can tell your impact story to a funder from evidence, not anecdote.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

06 Strategy-to-operations alignment

Whether day-to-day operations deliver your strategic intent.

Statement	Score (1–5)
Anyone on the team could explain how this month's work connects to the strategy.	
You say no to opportunities that don't fit - using your values and strategy as the filter.	
Priorities survive contact with the week: urgent work doesn't routinely displace important work.	
Growth decisions (new hires, services, funding) are tested against operational capacity before you commit.	
Dimension total (out of 20)	

What is behind your score? Anything working well, or getting in the way?

Making sense of your scores

Transfer your six dimension totals below for an overall score out of 120. Then read the shape before the number: a spiky profile - two strong dimensions, two weak ones - tells you more than the average ever will.

Dimension	Total (out of 20)
01 Governance & decision-making	
02 Financial management & sustainability	
03 People, culture & capability	
04 Systems, tools & data	
05 Impact measurement & learning	
06 Strategy-to-operations alignment	
Overall score (out of 120)	

The four bands

Under 48	Held together by heroics. Broadly ad hoc. Your people are compensating for missing structure daily. The good news: at this stage even small operational fixes buy back significant time. Start with your lowest-scoring dimension.
48 – 71	Outgrowing your systems. Broadly emerging. The classic growth-strain profile: what worked at one size is fraying at your current one. Structure exists, but it is inconsistent and it leans on the same few people to hold it together. This is the highest-leverage moment to invest in operations, before the cracks become culture.
72 – 95	Solid foundations, uneven load. Broadly defined. There is a documented way of doing most things and most people follow it. The basics work. What holds you back now is a small number of dimensions carrying more strain than the rest, and the gap between what is written down and what is genuinely owned. Targeted work on your two weakest areas will lift the whole organisation.
96 – 120	Operationally mature. Your operations are actively making everyone better. The question shifts from fixing to compounding: where can better systems create new capacity for the mission?

Three signals worth taking seriously

These matter regardless of your total score.

>1 Any single statement scored 1.

That is a key-person risk or a compliance risk wearing a maturity costume. It deserves attention on its own terms, whatever the rest of the picture looks like.

>2 A three-point spread between two people on the same statement.

You are running two different organisations in one building. Neither person is wrong - they are describing different lived realities, and the gap between them is usually where the real operational issue sits.

>3 Systems scoring well while Strategy-to-operations scores poorly.

You have built good machinery pointed in an unclear direction. The fix is rarely more tooling.

Anything the scores do not capture?

The numbers are a starting point, but they flatten things. If there is something you would want someone looking at your operations to understand - a frustration, a workaround everyone relies on, something that works far better than it should - this is the place for it.

Where do you agree, and where do you not?

Once several people have completed the assessment separately, bring the totals together here. You are not looking for an average - you are looking for the spreads.

Dimension	Person 1	Person 2	Person 3	Person 4	Person 5
01 Governance & decision-making					
02 Financial management & sustainability					
03 People, culture & capability					
04 Systems, tools & data					
05 Impact measurement & learning					
06 Strategy-to-operations alignment					
Overall (out of 120)					

Three questions worth asking of the completed grid

- > Where is the widest gap between two people, and what does each of them know that the other does not?
- > Which dimension is lowest on average, and is that the one you are actually spending your energy on?
- > Where does everyone agree things are weak? That is your least controversial place to start.

What to do next

Pick your lowest-scoring dimension and make one change this month that moves a single statement up one point. Operational maturity is built in one-point increments, not transformations.

Thank you for taking the time

Whatever you do next with this is yours. If it is useful on its own, that is enough.

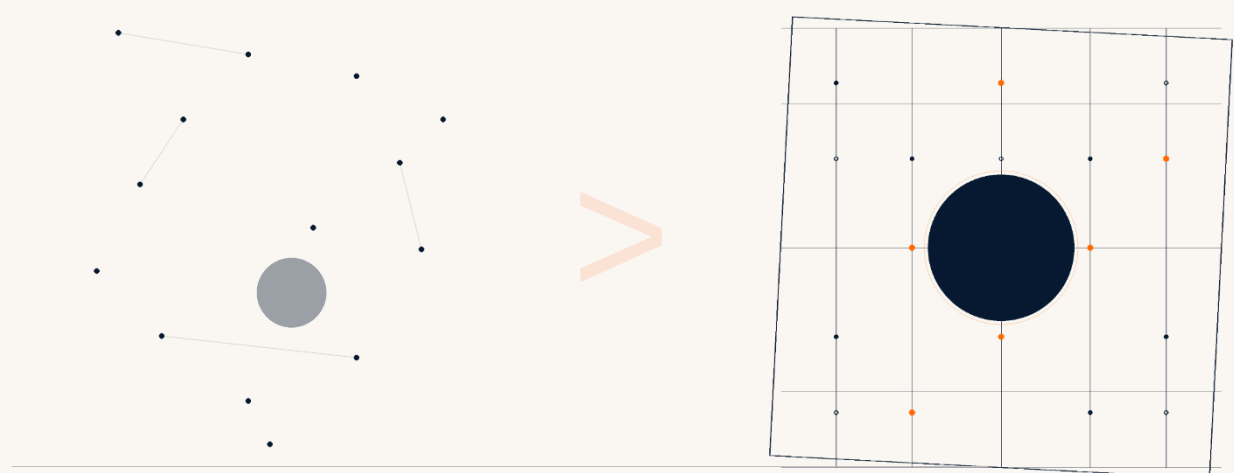
If several of you completed it, do not skip the comparison. Look for the widest gaps before you look at the averages - a three-point gap between two people tells you they are running different organisations, and that is the thing worth understanding.

That conversation is the part worth doing well. It is also the easiest part to get wrong, because it asks people to disagree out loud about how their own organisation works.

Would you rather someone independent held it?

The facilitated Operational Maturity Assessment takes you from six completed sheets to a shared picture, a prioritised roadmap, and a written report you can take to your board. From £700, on a sliding scale by organisation income.

› [Book a 30-minute call](#) for a conversation about what your sheets are telling you.



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