

ORGANIZATIONAL ASSESSMENT

ORGANIZATIONAL ASSESSMENT CHECKLIST

Organizational Purpose	Adequate	Upgrade	Absent
1. Current and communicated mission statement.			
2. Functional set of bylaws.			
3. Orientation for new board members.			
4. Orientation for new administrators.			
5. Annual review of programs in relation to organizational purposes and policy.			
6. Annual planning process and forecast formalized with staff and board.			
Total number			
Percentage (total number divided by 6)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Board of Directors	Adequate	Upgrade	Absent
1. Bylaw directives on the role of the board.			
2. Organized recruitment.			
3. Expected qualifications stated.			
4. Frequency of board meetings.			
5. Committee system.			
6. Board members' attendance at meetings.			
7. Advice and planning/policy deliberations.			
8. Advocacy role.			
9. Personal financial support of organization.			
10. Generating gifts from other sources.			
11. Staff input to board.			
12. Systematized rotation of board members.			
13. Active executive committee.			
14. Communication to and from board members.			
15. Board members' personal involvement in programs and activities of the organization.			
Total number			
Percentage (total number divided by 15)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Program	Adequate	Upgrade	Absent
1. Annual or seasonal program plan.			
2. Annual market review to inform programs.			
3. Program elements costed out.			
4. Volunteer support in programs.			
5. Multi-year program plan.			
6. Counsel utilized to inform programs.			
7. Annual review of policy.			
8. Annual program review with board.			
Total number			
Percentage (total number divided by 8)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Staff	Adequate	Upgrade	Absent
1. Current position descriptions.			
2. Organizational chart.			
3. Staff size in relation to programming.			
4. Previous staff experience in relation to assignments within the organization.			
5. Staff benefits formalized.			
6. Salary scale competitive.			
7. Salary scale equitable.			
8. Annual performance reviews.			
9. Staff participation in planning.			
10. Staff sense of organization's purposes.			
11. Administrative leadership.			
12. Staff morale.			
Total number			
Percentage (total number divided by 12)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Marketing	Adequate	Upgrade	Absent
1. Marketing staff.			
2. Marketing department operating budget.			
3. Marketing materials.			
4. Annual marketing plan.			
5. Regular market research and analysis.			
6. Budget input from marketing perspective.			
7. Board support for marketing.			
8. Earned income goals.			
9. Competitive with other organizations in market area.			
Total number			
Percentage (total number divided by 9)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Fund-raising	Adequate	Upgrade	Absent
1. Annual goal clear and appropriate.			
2. Development office input into budget preparation.			
3. Development staff in relation to task.			
4. Annual fund planned and organized.			
5. Assistance from volunteers.			
6. Staff for special projects or special campaigns.			
7. Training of volunteers for fund-raising.			
8. Donor base.			
9. Planned, active expansion of donor base.			
10. Board members' financial support.			
11. Other individuals' financial support.			
12. Corporate financial support.			
13. Foundation financial support.			
14. Special events.			
Subtotal			

continued on following page

ORGANIZATIONAL ASSESSMENT

Fund-raising , <i>continued from previous page</i>	Adequate	Upgrade	Absent
15. Government financial support.			
16. Development materials.			
17. Gifts recording system.			
18. Gifts acknowledgment system.			
19. Pledge collecting system.			
20. Systematized information on donors.			
21. Communication with donors.			
22. Planned cultivation of donors and prospects.			
23. Development operating budget.			
Total number			
Percentage (total number divided by 23)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Finances	Adequate	Upgrade	Absent
1. Financial planning.			
2. Budget preparation process.			
3. Budget monitoring.			
4. Cash flow projections.			
5. Cash flow monitoring.			
6. Age of accounts payable.			
7. Effect of notes or loans.			
8. Line of credit.			
9. Annual audit.			
10. Data base and data processing.			
11. Financial management.			
12. Financial affairs department staff.			
13. Earned income.			
14. Investment returns.			
15. Formalized cost controls.			
Total number			
Percentage (total number divided by 15)			
Dominant (majority) assessment			

ORGANIZATIONAL ASSESSMENT

Public Relations	Adequate	Upgrade	Absent
1. Annual public relations plan.			
2. Communication about organization to various publics. **			
3. Developing new constituencies.			
4. Internal communication within organization.			
5. Organized way of obtaining and evaluating feedback information.			
6. Coordination with other areas of the organization.			
7. Organization publications.			
8. Staff in relation to total task.			
9. Public relations operating budget.			
Total number			
Percentage (total number divided by 9)			
Dominant (majority) assessment			

** Include social media strategies and platforms

ORGANIZATIONAL ASSESSMENT

Facilities	Adequate	Upgrade	Absent
1. Space for current administrative staff.			
2. Space for expanded administrative staff.			
3. Space for current staff.			
4. Space for expanded staff.			
5. Space for program activities.			
6. Space for expanded program activities.			
7. Image of facility to constituents.			
8. Organization's control of its space.			
Total number			
Percentage (total number divided by 8)			
Dominant (majority) assessment			

SCORES

The assessment checklist reveals both strengths and weaknesses of your organization, as perceived by the people who participated in the process. It can provide a profile of the organization, and it gives focus to discussions about where you should put your energies.

Whether you filled out the checklist yourself or in concert with others, please follow the same procedures for scoring it. After you have gone through the entire 105-item list, go back to the first category, *Organizational Purpose*, and count the number of check marks in each assessment column. Enter the total number at the bottom of each column, where it says *Total Number*. Do this for all categories.

Now go back to the first category and do the same thing for the percentages. Remember that you divide the number of responses in each

assessment column by the total number of items in the category. Complete this for all categories. As you go along, check off the assessment that is the majority, or dominant, judgment for each category. So if the highest percentage under *Organizational Purpose* was adequate, check adequate on the last line.

Transfer the dominant scores to the Comparison Tally Sheet, which is provided on the next page. The comparison between different categories will enable you to weigh the relative strengths and weaknesses of each. There may be some surprises. For example, many members of the board may have divergent views of the adequacy of each item, or there may be a difference of opinion about the relative strength of one category versus another. Patterns of comparison may also reveal areas that need improvement but that no one has been discussing in board meetings.

ORGANIZATIONAL ASSESSMENT

Comparison Tally Sheet	Adequate	Upgrade	Absent
Organizational purpose:			
Board of directors:			
Program:			
Staff:			
Marketing:			
Fund-raising:			
Finances:			
Public relations:			
Facilities:			

USING THE ORGANIZATIONAL ASSESSMENT

After your group has filled out the form together, you will find that some people see the process as an indication of how well the organization is doing, while others are concerned about how much work remains to be done. It's a little like the old water-glass routine, half empty versus half full.

The checklist brings to the surface a great deal of information about the organization. It can alert us to specific items that may need to be addressed, or it can identify broad categories that need to be considered as part of the board's overall allocation of time. For example, finding that the organization is weak in marketing may be an indication that this should receive more attention than program development.

The use of the information from the Organizational Assessment Checklist will vary with the size of the organization. A very small organization may desperately need to market, but may lack the resources to do so. Similarly, a larger organization may find that a specific aspect of marketing needs careful attention. By seeing the numbers as guides rather than predictors, the group can use this information to sort out a great deal of the complexity of the organization.

At this point, a lot of numbers have been used, perhaps to the delight of the Sequential members of the board. Meanwhile, some of the

Randoms may be wondering when all this figuring and judging is going to be done, so they can get the picture clearly in mind and interpret its relevance for the organization. It would be a big mistake to let those very helpful Sequentials, who love the numbers and the critical evaluation, dominate the discussion of what all this means. The group will be well served by allowing the Randoms, be they Concrete or Abstract, to integrate and synthesize the information before moving ahead.

The information gathered by the checklist will give you a focus as you develop plans for the organization. Just remember that, although in an ideal organization every item would be adequate, in an imperfect world it is hardly surprising that you will record many items as needing an upgrade or as being absent.

CONCLUSION

By completing the checklist and the tally sheet, and by beginning the analysis, what you have just done is to assess the strengths and weaknesses of your organization. In effect, you have quickly surveyed the internal environment to determine what is there and what is missing. The information you have just gathered, combined with the specific list of your strengths and weaknesses, will be valuable on many levels.

ORGANIZATIONAL ASSESSMENT

STRENGTHS AND WEAKNESSES OF OUR ORGANIZATION

Take a moment and quickly record, in broadly defined terms, the three major strengths of your organization and the three most important weaknesses.

Our strengths:

1.

2.

3.

Our weaknesses:

1.

2.

3.