

QUICK GUIDE 40 Nonprofit Organizational Assessment

Chapter 12 (pp. 554-557)

Using an organization with which you are familiar, complete the following assessment:

Internal Assessment

Legal basis, mission, by-laws, and history:

- The legal basis is clearly stated in appropriate documents.
- The mission statement is current and accurate and specifies reasons for existence and expected outcomes.
- The by-laws are relevant, current, and accurately portray the needs of the organization.

Administrative structure and management style:

- The administrative structure and management style fit the mission and services of the organization.
- Transparent and structural lines/systems for decision-making exist.
- Roles are clearly defined.
- Decision-making involves broad participation as practical and appropriate.
- Clear communication lines exist for dissemination of decisions.
- A comprehensive, integrated system is used for measuring the organization's performance and programs on a continual basis.

Program structure, programs, and services:

- Continual monitoring and assessment of the structure, processes, and programs occurs.
- Program evaluation data is collected, used, and linked to systemic improvements.
- Programs and services reflect evidence-based practice.
- The need for programs and services is well documented.
- Programs and services are well-defined and fully aligned with mission.
- A system is in place to collect data about gaps in the ability of existing programs to meet recipient and community-wide needs.
- New ideas are continually offered to meet service gaps.
- Programs and services are efficient, effective, and high-quality.

Organizational culture (i.e., physical surroundings, public relations, language, procedures, social justice/diversity):

- Physical infrastructure is well suited to current and anticipated needs.
- Physical infrastructure enhances effectiveness.
- Informal expectations are clearly articulated and supported by staff.
- A communications plan and strategy are in place and updated on a frequent basis.
- Marketing materials are professional, used consistently, and are current.
- Materials are provided in multiple languages as needed and reflect diversity.
- Communications carry a consistent and powerful message.

Personnel policy and procedures:

- Recruitment, selection, orientation, supervision, training and development, performance appraisal, termination, and grievance processes are identified.
- Relationships between and among positions and position qualifications are identified.
- Diversity is characterized as an asset.
- Organizational resources devoted to staff continuing education are sufficient.
- Policies and procedures reflect systems that are culturally competent.

Resources (i.e., financial, technological, personnel):

- Funding is sufficient, comes from diverse sources, fits the mission, and provides insulation from market instabilities.
- Board members embrace fundraising as a core role.
- Board fundraising plans are in place.
- Electronic data systems sufficiently gather and report appropriate data regarding clients, staff, volunteers, program outcomes, and financial information.
- The website is sophisticated, comprehensive, interactive, and regularly maintained.
- Positions are adequately and appropriately staffed, and vacancies are quickly filled.
- Staff are capable, committed, and bring complementary skills and momentum for improvement.
- Technology needs (e.g., computers, phones, etc.) are adequately met.

External Assessment**Relationship with funders and potential funders:**

- Fundraising skills and expertise are adequate.
- Sustainable revenue-gathering activities are used.
- A system for regular communication and reporting with current funders is used.
- A system to cultivate potential funders is used and continually updated.
- Ideas for revenue diversification are continually considered.
- Feedback from current funders is sought and considered.

Relationship with clients:

- A system to actively recruit and involve clients in offering feedback is used.
- A system to actively involve clients in making decisions is used.
- When possible, clients work collaboratively with staff in important roles, such as volunteer positions of leadership.

Relationship with organizations in network (i.e., referrals and partnerships):

- Strong, positive relationships with similar and related organizations exist.
- Presence on relevant partnerships is evident, and leadership roles are appropriately taken.
- Reciprocity is sought with relevant organizations.

Relationships with political figures:

- Strong, high-impact relationships using regular communication with a variety of potential entities (i.e., local, state, and federal government) and community leaders exist.
- Participates in substantive policy discussions with opinion and political leaders.
- Proactively and effectively influences policy-making at the local, state, and/or national level.