

## QUICK GUIDE 40 Nonprofit Organizational Assessment

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

### Internal Assessment

#### Legal basis, mission, bylaws, and history

The legal basis is clearly stated in appropriate documents.  The bylaws are relevant, current, and accurately portray the needs of the organization.

The mission statement is current and accurate and specifies reason for existence and expected outcomes.

#### Administrative structure and management style

The administrative structure and management style fit the mission and services of the organization.  Clear communication lines exist for dissemination of decisions.

Transparent and structured lines/systems for decision-making exist.  A comprehensive, integrated system is used for measuring the organization's performance and progress on a continual basis.

Roles are clearly defined.

Decision-making involves broad participation as practical and appropriate.

#### Program structure, programs, and service

Continual monitoring and assessment of the structure, processes, and programs occurs.

Programs and services are efficient, effective, and high quality.

Program evaluation data is collected, used, and linked to systematic 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.

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

Physical infrastructure is well suited to current and anticipated needs.

Communications carry a consistent and powerful message.

Physical infrastructure enhances effectiveness.

Informal expectations are clearly articulated and supported by staff.

A communications plan and strategy is 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.

#### Personnel policies and procedures

Recruitment, selection, orientation, supervision, training and development, performance appraisal, termination, and grievance processes are identified.  Policies and procedures reflect systems that are culturally competent.

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.

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

Funding is sufficient, comes from diverse sources, fits the mission, and provides insulation from market instabilities.  Technology needs (e.g., computers, phones, etc.) are adequately

met.

\_\_\_ 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.

#### External Assessment

##### Relationship with funders and potential funders

\_\_\_ Fundraising skills and expertise are adequate for funding needs. \_\_\_ Feedback from current funders is sought and considered.

\_\_\_ Sustainable revenue-generating 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.

##### Relationship with client s

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

\_\_\_ A system to actively involve clients in making decisions is used.

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

\_\_\_ Strong, positive relationships with similar and related organizations exist. \_\_\_ Reciprocity is sought with relevant organizations.

\_\_\_ Presence on relevant partnerships is evident, and leadership roles are appropriately taken.

##### Relationships with political figure s

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

\_\_\_ Participates in substantive policy discussions with opinion and political leaders.

Source: Adapted from: Netting, Kettner, McMurtry, ... Thomas, 2017; Marguerite Casey Foundation, 2012

## QUICK GUIDE 41 Organizational Policy Advocacy Activities

Complete the following tool about organizational policy advocacy activities using an organization with which you are familiar. Completing this assessment can shed light on the degree to which organizations use opportunities to engage in policy activities for the benefit of their clients and organization. Organizations that engage in few of these could consider expanding their policy advocacy activities to more opportunities, such as those listed here.

In the past, our agency has:

(Organizational Activities) (Activities with Clients and Community Members)

- Testified at public hearings held by the city council, state legislature, or other decision-making body.
- Participated in legislative or policy working groups with government officials.
- Engaged in nonviolent civil disobedience (i.e., deliberately broke a law to draw attention to unjust government policies, programs, or actions).
- Sent unique letters, emails, faxes, or texts to the city council, the mayor, local government agency directors, or senior staff members regarding legislation, government policies, government programs, or other issues that affect our clients.
- Participated in rallies, protests, vigils, and/or demonstrations to draw attention to an issue that affects our clients.
- Attempted to engage television, radio, print, or web-based media reporters to give attention to legislation, government policies, government programs, or other issues that affect our clients.
- Submitted letters to the editor or op-ed pieces to the local media regarding legislation, government policies, government programs, or other issues related to our client population.
- Helped draft legislation.
- Sponsored or co-sponsored forums or other community events to educate the general public about legislation, government policies, government programs, or a social issue.
- Submitted formal comments on rules, regulations, strategic plans, or other administrative governmental documents.
- Met with the city council members, the mayor, and/or local government agency directors or senior staff to discuss legislation, government policies, government programs, or other issues that affect our clients.
- Contacted city council members, the mayor, and/or local government agency directors or senior staff to discuss legislation, government policies, government programs, or other issues that affect our client populations.
- Participated in letter-writing campaigns, “sign-on” letters, “call-in days,” postcard drives, petition drives, or email drives to contact public officials about legislation, government policies, government programs, or other issues that affect our clients.
- Submitted articles in our newsletter about legislation, government policies, government programs, or other issues that affect our clients.
- Posted fact sheets, issue briefs, articles, and/or testimony about legislation, government policies, government programs, or other issues that affect our client population on our website.
- Invited council members and/or the mayor to visit our program(s) to educate them about the issues that affect our clients.

- — Actively participated in coalitions related to our area of service or issue of concern. (Actively participated means attended and gave input at coalition meetings, joined and actively participated in coalition committees, attended coalition events, etc.)
- — Met with and/or distributed written information to clients and community members to educate/inform them about legislation, government policies, government programs, or upcoming public policy activities, (e.g., meetings, public hearings).
- — Solicited input from clients and community members to inform our agency's advocacy priorities.
- — Included clients and community members when making visits to the city council, state representatives, or other decision-makers.
- — Provided skill-building workshops to clients and community members to encourage their public policy participation. Skill building may include writing and giving testimony, writing letters, making phone calls, meeting with decision-makers, and other tactics.
- — Met with clients and community members to help them formulate direct action strategies around issues of their choice.
- — Conducted voter registration drives.
- — Facilitated transportation for clients and community members to encourage their participation in public policy activities and/or to vote at the polls.

Source: Adapted from Plitt ... Shields, 2009