

“MINI” ORGANIZATION ASSESSMENT

What is the tool used for?

How do I know if a Discovery Process or organization assessment could benefit my organization? The following “diagnostic tool” is a quick way to check on the readiness of your organization for an organization assessment. An organization assessment conducted by CCG will involve Board and staff and community supporters. It’s a great way to discover the strengths and opportunities for improvement in the organization and identify action steps.

Who should use the tool

Typically an Executive Director, senior staff, or Board member will have the broad understanding of the organization needed to fully answer the questions in the tool.

When do you use this tool?

A Discovery process is a good idea if:

- ❖ You have recently hired a new Executive Director or have stable leadership in place
- ❖ You want to begin a strategic planning process with a thorough assessment of the organization’s current status
- ❖ There has been significant Board turnover or an ongoing lack of participation
- ❖ The organization is at a critical point in its growth and development

A Discovery Process is not a good idea for you at this time if:

- ❖ You are experiencing leadership turnover—if you are in the process of searching for and hiring a new Executive Director
- ❖ There is overt, demoralizing conflict between Board and staff
- ❖ The organization has significant warnings from a financial audit or its tax status, licensing or accreditation is in jeopardy

How do you use this tool?

Print out the tool and circle one answer for each question. Each answer has a slightly different rating or continuum so choose the answer that best reflects the current situation in your organization.

How do you interpret the results?

The more items that are circled on the left side of the continuum, the healthier your organization. The more items that are circled on the right, the more your organization might benefit from an organization assessment process that offers a way to see the organization as a whole and hold a facilitated discussion on next steps. Take a minute to visualize how the issues reinforce one another.

Let’s define one word we use in the survey: Stakeholders

Stakeholders are people whose ideas and opinions are important to the organization.

Stakeholders can be “inside” the organization (such as staff or volunteers) or “outside” (such as funders or community partners). The Discovery Process offers stakeholders opportunities to express candid thoughts about the organization and give worthwhile feedback on its services.



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Instructions: Circle one number for each question. Draw a straight line from circle to circle. The more items that show to the left, the healthier the organization. The more to the right, the more the organization might benefit from an organization assessment. Take a minute to visualize how the issues reinforce one another.

To what extent...

Do stakeholders respect and support the purposes of the organization?	Completely			Not at all		Don't know
	1	2	3	4	5	D/K

Are Board members engaged and supportive?	Highly engaged			Disengaged		
	1	2	3	4	5	D/K

Is conflict managed in a way that enhances good working relationships?	Well managed			Poorly managed		
	1	2	3	4	5	D/K

Are administrative and financial systems adequate for the needs?	Completely adequate			Non-existent		
	1	2	3	4	5	D/K

Are Board and staff roles and responsibilities defined?	Clearly defined			Confused		
	1	2	3	4	5	D/K

Are existing policies and procedures helpful?	Quite helpful			Non-existent		
	1	2	3	4	5	D/K

Is the organization effective in securing the necessary financial resources?	Quite effective			Very ineffective		
	1	2	3	4	5	D/K

Does staffing remain stable?	Low turnover			High turnover		
	1	2	3	4	5	D/K

Does the Board plan for the future?	Annually			Never		
	1	2	3	4	5	D/K

Are program outcomes evaluated?	Regularly			Never		
	1	2	3	4	5	D/K

Do staff plan for the future?	Each week			Never		
	1	2	3	4	5	D/K