

Organizational Self-Assessment Tool

This questionnaire is designed to help you assess your organization. It will help affirm strengths and identify weaknesses and areas, that need attention. It should take about twenty minutes to respond to the questions and evaluate.

Directions: Do not put your name anywhere on this questionnaire. Please respond to all statements. For each, answer to what extent you agree that the statement is true for your organization. Be open and honest! For each statement, circle only one number to indicate your thinking. After you have responded to all of the statements, transfer the numbers to the scoring sheet.

These are the response choices for each statement:

- 1 I agree** (this statement *is* certainly true for my organization).
- 2 I agree slightly** (this statement is sometimes or partly true).
- 3 Uncertain** (I don't know).
- 4 I disagree slightly** (this statement is usually not true).
- 5 I disagree** (this statement is certainly not true for my organization).

1. The goals of this organization are clearly stated. 1 2 3 4 5 (1)
2. Detailed operations decisions are not made by the board. 1 2 3 4 5 (2)
3. Board meetings are mostly concerned with matters of policy, planning, funding, and financial management, not day-to-day details. 1 2 3 4 5 (3)
4. Meetings are used to effectively make decisions and accomplish important tasks. 1 2 3 4 5 (4)
5. I feel like my efforts are recognized and appreciated. 1 2 3 4 5 (5)
6. I know most of the board members and staff well enough to understand their skills. 1 2 3 4 5 (6)
7. This organization prepares an annual budget which is regularly monitored to see if expenses and revenues are on target. 1 2 3 4 5 (7)
8. New ideas are fairly considered in this organization. 1 2 3 4 5 (8)
9. This organization identifies and nurtures new volunteer leadership. 1 2 3 4 5 (9)
10. New board members are oriented to their tasks and given a written description of their responsibilities. 1 2 3 4 5 (10)
11. I understand my responsibilities. 1 2 3 4 5 (11)
12. We have a balanced source of funding from grants, donations, and earned revenue. 1 2 3 4 5 (12)
13. This organization is open to changes. 1 2 3 4 5 (13)
14. I understand the purpose of this organization. 1 2 3 4 5 (14)
15. There are adequate systems to assure that volunteers, staff, board members, and the committees communicate with each other. 1 2 3 4 5 (15)
16. The board has an ongoing process for determining leadership needs and recruiting new board members. 1 2 3 4 5 (16)
17. The board reflects the community's demographics and racial mix and has a balance of the needed skills, contacts, and access to resources. 1 2 3 4 5 (17)
18. When conflicts arise, we cope with them. 1 2 3 4 5 (18)
19. Staff and board members have timely, accurate financial information. 1 2 3 4 5 (19)
20. We tend to spend our money and energy to fulfill our highest priorities. 1 2 3 4 5 (20)
21. When decisions are made, it is clear who is responsible to do what by when. 1 2 3 4 5 (21)
22. Board members get timely information in order to fulfill their job: agendas, minutes, financial reports, etc. 1 2 3 4 5 (22)
23. Staff, volunteer and professional, are regularly evaluated. 1 2 3 4 5 (23)

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|---|---|---|---|---|---|------|
| 24. Staff have adequate salaries and benefits. | 1 | 2 | 3 | 4 | 5 | (24) |
| 25. Someone is clearly responsible to monitor volunteer and staff fulfillment of committed tasks. | 1 | 2 | 3 | 4 | 5 | (25) |
| 26. For every program, it is clear who is in charge. | 1 | 2 | 3 | 4 | 5 | (26) |
| 27. Enough board members are committed to the organization and devote enough time so that the board is effective. | 1 | 2 | 3 | 4 | 5 | (27) |
| 28. Staff members have job descriptions and understand their responsibilities. | 1 | 2 | 3 | 4 | 5 | (28) |
| 29. I clearly benefit from my association with this organization. | 1 | 2 | 3 | 4 | 5 | (29) |
| 30. Newcomers to the organization are quickly made to feel welcome | 1 | 2 | 3 | 4 | 5 | (30) |
| 31. I understand the financial condition of this organization. | 1 | 2 | 3 | 4 | 5 | (31) |

Now transfer your scores to the scoring section on the next page to self-assess your organization.

Organizational Self-Assessment Instrument Scoring Sheet

Instructions: Transfer the numbers you circled on the questions to the blanks below, add each column, then divide by the number of blanks in that column. This will give comparable scores for each of the areas.

PURPOSE	STRUCTURES	LEADERSHIP	GOVERNANCE	MANAGEMENT
1. _____ +	2. _____ +	9. _____ +	3. _____ +	4. _____ +
14. _____ +	15. _____ +	16. _____ +	10. _____ +	11. _____ +
20. _____ =	21. _____ +	26. _____ =	17. _____ +	23. _____ +
	25. _____ =		22. _____ +	28. _____ =
			27. _____ =	
<u>Subtotal</u>	<u>Subtotal</u>	<u>Subtotal</u>	<u>Subtotal</u>	<u>Subtotal</u>
Div by 3 =	Div by 4 =	Div by 3 =	Div by 5 =	Div by 4 =
_____	_____	_____	_____	_____

REWARDS	RELATIONSHIPS	RESOURCES	ATTITUDE TOWARD CHANGE
5. _____ +	6. _____ +	7. _____ +	8. _____ +
24. _____ +	18. _____ +	12. _____ +	13. _____ =
29. _____ =	30. _____ =	19. _____ +	
		31. _____ =	
<u>Subtotal</u>	<u>Subtotal</u>	<u>Subtotal</u>	<u>Subtotal</u>
Div by 3 =	Div by 3 =	Div by 4 =	Div by 2 =
_____	_____	_____	_____

Interpretation of the Scores

An ideal organization, with an average score of 1 for each area, does not exist. Even if it did, it would not be possible to describe one ideal for all circumstances. For example, organizations with complicated objectives need more structures than a more informal, networking organization.

A score of 1 within every category would describe that ideal organization in an undefined circumstance. The scores give a starting point for some analysis about the health and character of an organization. Generally scores of 2 or below describe healthy organizational characteristics. Scores above 5 indicate problem areas. Scores of 5 indicate areas that definitely should be closely examined to see if there is a problem and if there can be improvements.