

# SAMPLE ORGANIZATIONAL ASSESSMENT

**Instructions:** *Read each question carefully, and pick from the answers on the answer sheet. Answer the questions based on your own perceptions and opinions about the board of directors and the organization, not as you think others might respond. If you do not know the answer, don't guess – simply say "I Don't Know."*

## I. Board Governance

1. Do you know the mission of your organization?
2. Do all board members understand their personal liabilities and legal responsibilities?
3. Is the board's time spent developing and setting policies for the organization rather than on day-to-day operations?
4. Is the current size of the board appropriate for accomplishing its work?
5. Does the organization have set procedures for electing board members and officers, for staggered terms of members and for a committee structure?
6. Does a nominating committee develop criteria for recruiting and selecting new board members, based on the current needs of the board?
7. Does the nominating committee seek nominations for your board from the staff, current board members, and the organization's clients and members?
8. Does your organization have an orientation for new board members that covers roles and responsibilities as well as specifics about your programs?
9. Does the organization provide leadership training to future officers and committee chairs?
10. Are members recognized and appreciated for their contributions and accomplishments?
11. Are materials such as the agenda, minutes of the last meeting, and background reports mailed to board members before the board meeting?
12. Does the board have effective working committees, such as finance, acquisition, fundraising, personnel and community relations, that report regularly to the board?
13. Do the committees include both board and non-board members?
14. Are committee members provided with job descriptions?
15. Do board members have a good record of attendance at board and committee meetings?
16. Is there a clear process of conducting discussions and making decisions at meetings?
17. Does the meeting agenda state clearly the purposes of the meeting?
18. Do officers, chairs and board members understand their roles during meetings?

## ORGANIZATIONAL ASSESSMENT (CONTINUED)

19. Is time spent on discussion, prior to action, appropriate?
20. Are all members, including new members, encouraged in board and committee meetings to present their views, opinions and ideas on both old and new business?
21. Does your organization have a positive climate, enabling people of diverse perspectives to resolve differences and remain involved?
22. Does your organization identify the skills and interests of all members in order to maximize the volunteer satisfaction in board roles and assignments?
23. Are routine matters requiring board action handled efficiently during meetings?

### II. Planning and Evaluation

24. Does your organization have a systematic planning process?
25. Does the board develop realistic short- and long-range goals consistent with the mission and values of the organization?
26. Does your organization set measurable objectives and time frames for achieving them?
27. Do the plans specify who is responsible for implementation?
28. Does your organization evaluate its programs, based on objectives and workplans?
29. Is evaluation built into the planning process?
30. Do board members, staff, volunteers and community resource people participate in the review and evaluation of the organization?
31. Do the evaluations result in a positive, constructive context for improving effectiveness throughout the organization?

### III. Personnel

32. Does your organization have written personnel policies, periodically reviewed by the board to keep them up-to-date and in compliance with legal requirements?
33. Does the board have a personnel committee?
34. Does the executive director have a written, realistic job description?
35. Is the executive director evaluated by the board at least once a year?
36. Does the board recognize its obligation to provide a reasonable salary and benefits package to its staff members?
37. Are the executive director, board president and board members clear about their roles, responsibilities and authority?
38. Does the board assume sole responsibility for setting policy?
39. Does the executive director assume responsibility for implementing the policies and administering the internal operations of the organization?
40. Are the relationships between board members and staff members characterized by openness, trust and mutual respect?

## ORGANIZATIONAL ASSESSMENT (CONTINUED)

41. If board members also serve as program volunteers, do they understand the different lines of authority for the two roles?

### IV. Fundraising

42. Does the board understand its responsibility for ensuring that the organization has sufficient financial resources to conduct its operations?
43. Does the board have an active fundraising committee?
44. Does your organization have a fundraising plan that identifies the sources and uses of funds, focuses on diverse funding sources, etc.
45. Are such factors as number of volunteers and staff hours, community visibility and image, and the organization's purpose considered in all fundraising decisions?
46. Are the purposes of your fundraising activities clearly stated and communicated to the community?

### V. Financial Decision Making

47. Do board members understand their roles as community trustees who are legally responsible for the finances of the organization?
48. Does your board have a finance committee to oversee all of the organization's finances and make regular reports to the board?
49. Is the annual budget developed to reflect the purposes, values, and program priorities of the organization?
50. Does the board approve the annual budget?
51. Do all members understand the financial reports and balance sheets so that they are comfortable asking questions?
52. Has CEO established internal controls necessary to safeguard its finances?
53. Do the financial statements include amounts budgeted, amounts received and expended, and the variances, both monthly and year-to-date?
54. Does CEO have its finances audited annually by a certified public accountant who presents a report to the board?

### VI. Marketing and Public Relations

55. Does your organization have a marketing plan?
56. Does your organization's planning include an assessment of your community's future conservation needs?
57. Does your organization have an effective system for informing the public about programs and services?

## ORGANIZATIONAL ASSESSMENT (CONTINUED)

58. Is there a system for receiving information, ideas, and suggestions from members and other potential "clients?"
59. Does your organization use the media effectively?
60. In your opinion, is the public's impression of your organization accurate?

*When you have completed the questionnaire, go back through the questions and circle the ones that you feel offer the most relevance to the issues facing your organization. Which questions point to the core issues of the organization?*