



ORGANIZATIONAL HEALTH ASSESSMENT

PURE **MOMENTUM**
EXPERTS IN NON-PROFIT EXCELLENCE | CONSULTING

Organizational Health Assessment

What to expect:

- Quickly identify org areas of need within the Infrastructure, Resources, Staff Engagement, and Sustainability domains
- Embedded Reference List includes a number of tools and strategies to help take your nonprofit to the next level
- Assess the Strengths, Weaknesses, Opportunities, and Threats to your agency, so you have no surprises moving forward
- Gain a holistic picture of the vitality and sustainability of your nonprofit, leading to confident strategic direction and decision making
- PDF format and results allow you to know exactly where to prioritize your energy and focus and can be easily completed by your Team as well

Introduction

Assessing the health of your organization is imperative to define what's working well, areas in need of attention, and to uncover opportunities to further poise your agency for future sustainability and legacy.

This Template is based on the evaluative and intervention measures described in the book *Organizational Poverty: Valuing Human Capital in Non Profit Settings*, by Dr. Lydia.

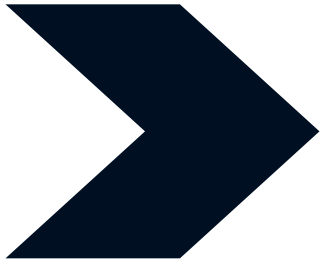
In addition, this document is derived from the 5 Core Values of our Company:

- Organizations are living and breathing, complex organisms.
- People are the core drivers of change, innovation, and mission- therefore they matter.
- Organizational systems include: design, roles, and workflows.
- Gaps or misfits in one part of the organization impacts the whole.
- Without built-in accountability points at all levels, the system will function poorly and inevitably collapse.

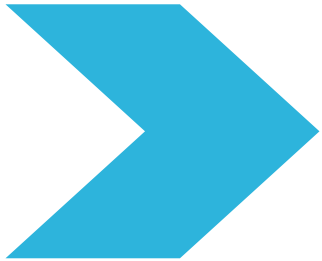
How to use this template

The Organizational Health Assessment template is to be used in conjunction with both industry best practice recommendations (see our References list), and in alignment with the vision, mission, core values, and culture of your organization.

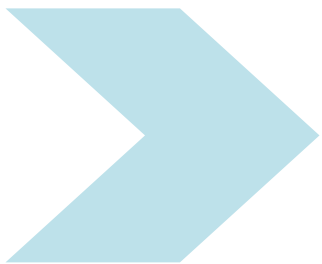
Just a few things to note:



It may be helpful to gain a comprehensive view of the health of your organization, by having more than one individual complete the Assessment, and aggregating the results. This can be easily accomplished by integrating this assessment into Google Forms, Survey Monkey, or a similar type of survey software.



Conduct a SWOT analysis. SWOT analysis is a strategic planning technique used to help an organization identify strengths, weaknesses, opportunities, and threats related to organization and project planning.



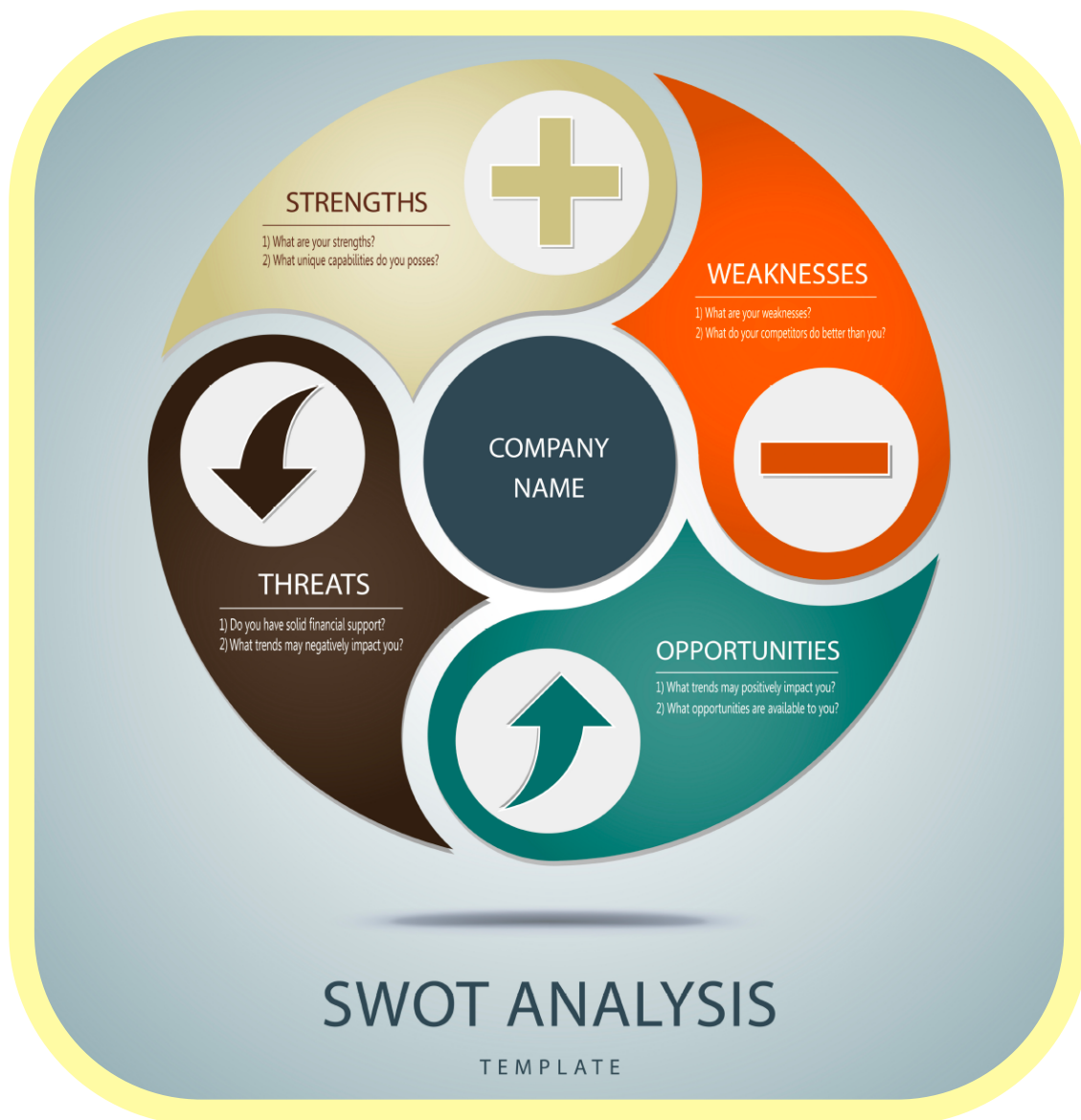
Know when to call in help! An organizational development consultant can assist you, particularly when the following needs arise:

- Significant changes in Board or Executive leadership
- Changes in the vision, mission, or strategy of the organization
- Changes in industry regulatory compliance or reporting requirements
- Changes in funding sources or donor cultivation
- Pervasive staff retention or organizational culture concerns
- Lack of measurable or quantifiable results
- Expansion or reduction of services

SWOT Analysis

Proactive strategy planning is what best positions an organization to thrive in the midst of change and uncertainty. As Leaders, we cannot just reactively respond to what's happening around us, but we must also gain enough altitude in our perspectives to see what may be coming in the future, and to place our organization in a position of strength.

SWOT analysis is one of those valuable planning tools to help your organization operate from a place of informed strategy.



Organizational Health Assessment

ADAPTABLE INFRASTRUCTURE

	Unsatisfactory	Needs Improvement	Satisfactory	Not Applicable
1) Does the internal structure of the organization serve as an effective foundation for the achievement of agency vision, mission, and objectives?				
2) Is the organizational culture healthy enough to withstand the ebbs and flows of leadership, fiscal, and regulatory compliance changes?				
3) Do the standard operating procedures and other agency policies support the achievement of agency vision, mission, and objectives?				
4) Has the agency created, implemented, and evaluated a strategic plan?				
5) Do employee job descriptions match their actual day-to-day experiences?				
6) Do the job descriptions clearly delineate aligned responsibilities above and below each job role in the agency, thus reducing redundancies and lack of clarity?				
7) Is there a systems and work-flow chart that clearly describes the relationship between individual job tasks and departmental/interdepartmental goals?				
8) Is there a systems and work-flow chart that clearly describes the relationship between interdepartmental goals, executive leadership tasks, and the achievement of agency goals and objectives?				
9) Have functional systems of checks and balances been created to assess decision-making processes and structural gaps or misfits within the agency?				
10) Is there a process for incremental assessment and evaluation of the agency's infrastructure and design?				
11) Do you have a CFO/ CPA who produces monthly balance and income statements that are reviewed by the Board?				
12) Does your agency conduct a bi-annual financial audit?				
13) Do you implement effective program evaluation and data collection methodologies to increase agency program performance?				
14) Does your staff have a clear understanding of program outcomes, outputs, goals and objectives?				
15) Does your agency have a clear process for Program/ Service Development and Evaluation?				

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RESOURCEFULNESS & COLLABORATION

	Unsatisfactory	Needs Improvement	Satisfactory	Not Applicable
1) Is the organization efficiently and effectively utilizing all internal and external resources at its disposal?				
2) Are financial resources efficiently assessed, stewarded, and distributed with an eye toward the achievement of the agency vision and mission?				
3) Are human capital resources effectively managed, coached, and evaluated throughout all levels within the agency?				
4) Are physical resources such as buildings, grounds, and equipment proactively assessed and maintained?				
5) Are knowledge management and communication structures effectively facilitated within the organization?				
6) Is technological and operational equipment consistently evaluated, maintained, and replaced as needed?				
7) Does the agency actively seek opportunities to engage in mutually beneficial strategic collaborative partnerships?				
8) Does the agency effectively utilize external resources to support deficits in internal resources?				
9) Does the organization maintain a significant level of engagement with the surrounding community, including other non-profit agencies, businesses, faith-based institutions, and advocacy groups?				
10) Is there a process for incremental assessment and evaluation of opportunities to increase resourcefulness and collaboration?				
11) Are knowledge management and communication structures effectively facilitated within the organization, for the Board, Executive Leadership, and Staff?				

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STAFF ENGAGEMENT

	Unsatisfactory	Needs Improvement	Satisfactory	Not Applicable
1) Does the agency implement best practices in the on boarding, training, evaluation and disciplinary functions of staff management?				
2) Are there structures set in place to effectively evaluate, address, and prevent workplace stress and staff burnout?				
3) Do systems exist to effectively evaluate, address, and mitigate the impact of vicarious trauma?				
4) Are all staff encouraged and coached to practice resilience in the workplace?				
5) Are all staff placed in positions that maximize their innate skills, talents, and gifts?				
6) Does the agency champion the development of employee competence and mastery of job tasks and roles, particularly those of mid-management supervisors?				
7) Does the organization promote the intrinsic motivation of all employees?				
8) Are consistent opportunities for appreciation, positive recognition, and incentives built into the organizational culture and structure?				
9) Does the agency provide ample and relevant staff development and training opportunities, both internal and external, to all staff?				
10) Is there a process for incremental assessment and evaluation of staff development, engagement, and retention?				
11) Do you provide anti-harassment training for employees and volunteers?				
12) Do you conduct annual performance evaluations for all staff within your organization?				
13) Do you have an agency- wide Training & Development Plan, with an integrated training platform for implementation?				
14) Does your agency have a Human Resources Manual?				

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SUSTAINABILITY

	Unsatisfactory	Needs Improvement	Satisfactory	Not Applicable
1) Does the agency actively engage in succession planning for all agency leaders, including the Board of Directors?				
2) Does the agency regularly create plans and implement effective strategies for fund development, donor cultivation, and fiscal contingency planning?				
3) Does the organization actively engage in board and executive leadership development?				
4) Are evaluative processes set in place to prevent the overextending of job roles and duties for staff?				
5) Are effective change management principles practiced throughout the agency?				
6) Are relevant bodies of knowledge - organizational history, changes in vision, direction, or strategy - effectively communicated and archived within the agency?				
7) Does the agency practice effective brand development and marketing strategies?				
8) Does the agency utilize relevant technology to capture compliance, quality assurance, and community impact data?				
9) Does the organization have a plan that promotes further engagement with the surrounding community including other nonprofit agencies, businesses, faith-based institutions and advocacy groups?				
10) Is there a process for incremental assessment and evaluation of agency Sustainability and legacy creation?				
11) Does your Board of Directors clearly understand their duties and legal obligations? Are they fully engaged in organizational meetings and activities?				
12) Does your agency have a document retention policy?				
13) Do you have a fully- staffed Human Resource Department?				
14) Does your agency have a Strategic Plan and a Succession Plan?				
15) Does your organization have a Board of Directors Manual?				
16) Does your agency have an Executive Director's Manual?				
17) Does your organization have a Finance Operations Manual?				

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COMMENTS

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Establish Momentum Service, to
see how we can support your
agency with problem
identification, and design a
roadmap on how to move forward.

Visit: www.puremomentumconsulting.com/establishmomentum



- *Dr. Lydia*



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