

Organizational Evaluation Survey

Mission Statement: (Please check all that apply.)

- € Mission statement is unclear or is a limited expression of organization's purpose.
- € Mission is held by only a few, or lacks broad support, or is rarely referred to.
- € Mission statement clearly reflects purpose and reason for organization's existence.
- € Mission statement is known by most within the organization, and often referred to.
- € Mission statement is well known and used to guide all programs.

Vision: (Please check the one statement that best applies.)

- € There is little shared understanding of what organization aspires to become.
- € A vision statement was created but does not guide all organizational improvements.
- € Vision statement inspires most organizational improvements beyond current levels.
- € Vision statement is broadly held within the organization and frequently used to inspire growth related programs and development.

Strategy: (Please check all that apply.)

- € We have not had a new strategic planning process during the past three years
- € New programs and improvements are largely unrelated or scattered initiatives.
- € Strategic plan is not frequently used to plan new programs or improvements.
- € Strategic plan is linked to mission and vision, but not fully put into action.
- € Strategy is mostly known, and day-to-day activities are partly driven by it.
- € Organization has clear medium- and long-term strategy that directs day-to-day activities.

Program Review and Growth: (Please check the one statement that best applies.)

- € There has been no review on how to grow programs, or how to improve them.
- € There has been some review of programs, and some effort to improve programs.
- € Occasional action is taken to scale-up programs or replicate them.
- € There are frequent reviews of programs with appropriate action steps to improve them, with possibility of scaling-up programs.

New Program Development: (Please check the one statement that best applies.)

- € No new programs have been developed over the past year.
- € New programs are largely unrelated to mission or to one another.
- € New programs fit together as part of a clear strategy and are related to mission & vision.
- € All old and new programs are well designed to fit together with mission and vision and are clearly linked with overall strategy.

Measurable Results: (Please check the one statement that best applies.)

- € Programs do not have specific goals, or goals do not have specific measurable results.
- € Goals are too easy to achieve, for example, "To increase enrollment/attendance."
- € There are aggressive targets in most areas, linked to overall strategy.
- € There are demanding goals for all programs that are focused on outcomes/outputs.

Fundraising Skills: (Please check all that apply.)

- There is a clear donor marketing message, i.e., reasons why donors should give.
- We have a donor base of more than 500 donors.
- Fundraising events raise more than \$10,000 in net revenue.
- Fundraising events raise more than \$30,000 in net revenue.
- Most fundraising activities are performed by paid staff members.
- Volunteers perform most fundraising activities with support of staff and external fundraising expertise.
- Fundraising activities include events, grants, direct mail appeals, and online marketing.
- Sponsor levels are well defined, and we have several sponsors that support us annually.

Partnership Development: (Please check the one statement that best applies.)

- We do not have any programs that are currently in partnership with other agencies.
- We are in the early stages of partnership development with other agencies and/or the private sector.
- Partnerships a role in some of our programs but are not always mutually beneficial.
- We work in mutually beneficial relationship with several partners.

Public Marketing/Publicity: (Please check the one statement that best applies.)

- We do not publicize our programs or events, aside from flyers and brochures.
- Organization makes limited use of marketing and publicity.
- Organization has staff or volunteers with skills in publicity, and takes advantage of opportunities as they arise, and has limited use of direct mail.
- Organization has staff/volunteers that fully take advantage of all publicity opportunities and understands the importance of marketing and use of direct mail.

Board Responsibilities: (Please check all that apply.)

- Board functions according to bylaws to review and approve budgets and direct organization.
- Board regularly reviews CEO/ED performance.
- Board reviews IRS 990 filings and financial audits.
- Board is actively involved with setting vision statement, strategy, and organizational direction.
- Board is actively involved with program development, program review and growth.
- Board is actively involved with all fundraising activities with support of staff.

Use of Technology: (Please check all that apply.)

- Basic website contains general information.
- Website is used to recruit new members and/or donors.
- Site includes video, testimonials, candid photos, and ways of collecting info from visitors.
- Website is kept up-to-date on a regular basis with latest events and programs.
- E-mail marketing is used to drive traffic to the website and to collect visitor information.
- E-mail is used to keep in touch with organization's target audience/members.
- Members are given training opportunities for use of computers, tablets, and smart phones.
- Donor information is kept in a donor relationship management (DRM) software database.