PARK COUNTY NONPROFIT NETWORK

Looking Closely Shouldn't be Spooky
with Julie Rodda

WEDNESDAY, OCT 27
NOON - 1:00 PM
-- offered via Zoom --

LOOKING CLOSELY SHOULDN'T BE SPOOKY…

USING ASSESSMENT TO TAKE THE FEAR OUT OF LEADING WELL.
Three treats to take with you today!

1. Clarity as to why organizations need to engage in a deep dive from time to time.

2. Effective arguments for including an organizational assessment as part of your strategic goal setting process.

3. A greater understanding of how assessment results have the power to bring purpose and clarity to decision making—and how this helps your organizations thrive.

Looking under the hood as an analogy…

- How are things running?
- Does this need a tune up?
- Do we have regular maintenance needs scheduled? (or are we just driving down the road?)
- Are our finances in a strong position if something should break?
What about our curbside appeal?

- Does our community recognize our "missional vehicle"? (programs, services)
- Does the media showcase our work from time to time? Why or why not?
- Where do we shine, and where could we improve?

Assessment Findings Will Bring Clarity for All Participants

- Where would you say your board lands in the 'running well over curb appeal'?
- Where would you say your staff lands in this segmentation?
- Can you see where it might present challenges for understanding or prioritizing efforts?
- How do we get to the place of honest discussion about whether we are functioning well and recognized as a true community asset?
How does Assessment Empower You and Your Board?

- Assessments can help boards and staff more quickly identify areas in which your organization can improve its effectiveness for delivering on its mission.

- The process itself helps everyone voice their thoughts, understand one another’s points of view, and clearly prioritize what needs improving to help you step into the future with agreement!

What are Organizational Assessments?

- The goal of assessments is to collect data that can help the nonprofit evaluate whether or not it is making progress towards various goals, including whether the nonprofit can demonstrate that it is making progress advancing its mission.
Key things you will discover from engaging the assessment process

- How well your board is truly operating
- If programs are actually advancing your mission (or just keeping you busy)
- What your leaders feel are priorities
- How the public or media perceives your work
- Whether or not you should undertake new program opportunities

Sample of Types of Assessments

- Organizational Assessments (Sometimes called Benchmarking)
- Program Performance Assessments (functionality, mission focus, outcomes evaluation)
- Financial and Fundraising Assessments (sustainability, donor income base, revenue streams, etc.)
- Staffing Assessments
- Community Awareness and Marketing
- Emergency Preparedness…
How hard (or easy) is this?

**Various options may include:**
- Online surveys taken by key parties, then compiled by a staff member or board member
- Sets of printed questionnaires distributed to both board and staff
- Do it yourself versions (free, online for download)
- Hire a professional with expertise to lead your team

- The truth is that there are many diverse options when it comes to assessments. These options can range from simple and straightforward to fairly complex.
- A more complex approach should yield richer results, but even a brief assessment can be quite valuable for setting a tone that values improvement based upon facts, data and insight.

**SAMPLES OF WHEN YOU SHOULD DO AN ASSESSMENT**
When is it MOST important to gather data?

- Prior to undertaking new program endeavors
- Prior to doing strategic planning
- When you want to set priorities for the coming year’s focus (with everyone’s agreement!)
- When it seems like answering the immediate problem has become the norm
- When it appears there has been mission drift
- When funding is repeatedly falling short of goals

WHY is it important to know?

- If we don’t really know how our current programs are fulfilling mission, why would we engage more of them?
- Setting strategic planning goals that aren’t rooted in our current reality are simply IMPOSSIBLE to fulfill
- Leading from a position of informed strength and understanding helps everyone get on board (life gets easier)
- Fundraising for our mission is easier when our programs and priorities are clearly aligned.
WHEN QUESTIONS ARE FORMATTED BASED UPON BRAIN SCIENCE, THE RESULTS ARE WORTH THEIR WEIGHT IN GOLD.

Sample Question on Vision and Goals

The organization has a written vision statement and/or mission statement, which is up-to-date and is used to guide its choice of activities.

WHY WE ASK: Mission and vision statements help the organization focus on what it should do, among all the various possibilities.

They also help attract and recruit new members, volunteers, and board members.

How strongly does this describe your organization?  
(choices range from strongly agree to strongly disagree)
Evaluation Survey Question:
Board, staff, and other important participants got together and honestly evaluated the organization’s performance during the past year.

WHY WE ASK: Annual evaluations of the organization's performance are an opportunity to learn and to set new goals for the future. New insights arise out of candid, non-judgmental evaluation involving staff, board, volunteers, and other key groups. Simply put: Why set goals if you don’t evaluate them?

How strongly does this describe your organization? (choices range from strongly agree to strongly disagree)

Right now, what we do well in planning and monitoring campaigns and programs is...

Right now, the greatest challenges we face in planning and monitoring our programs and campaigns are...

Sample of open-ended Questions that ask for thoughts of participants that help us understand and weigh answers
THE VALUE OF EVERYONE’S INPUT

Who participates?

- Key staff
- Board members
- Past board members (?)
- Volunteers?
Let's take just a moment to consider the stages of development in nonprofits, and some attributes of a Healthy Nonprofit.

This resource comes from Joan Gerry's Leadership Lab. Messy, Growing, Healthy, Thriving.

Answers from honest assessment can align with the information in this chart to help us identify areas for improvement.
FINDINGS FROM YOUR ASSESSMENT SHOULD INFORM:

- YOUR PRIORITIES FOR THE YEAR
- YOUR ANNUAL PLAN BUDGETING
- AREAS FOR IMPROVING YOUR SERVICES

ASSESSMENT CAN ACTUALLY LESSEN THE LOAD IF RESULTS ARE INCORPORATED INTO THE ANNUAL PLAN

(AND)

REFERRING TO ASSESSMENT RESULTS HELPS EVERYONE REMEMBER WHY YOU PRIORITIZED THINGS THE WAY YOU DID.
The chat room is open—we’d love your feedback!

- What piqued your interest most?
- Where are you feeling the most excitement to learn more?
- PCCF intends to go deeper on this topic—what input would you like to give to direct presentation focus?