
PARK COUNTY NONPROFIT NETWORK



Looking Closely Shouldn't be Spooky

with Julie Rodda

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

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LOOKING CLOSELY
SHOULDN'T BE
SPOOKY...

USING ASSESSMENT TO TAKE THE FEAR OUT
OF LEADING WELL.

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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.

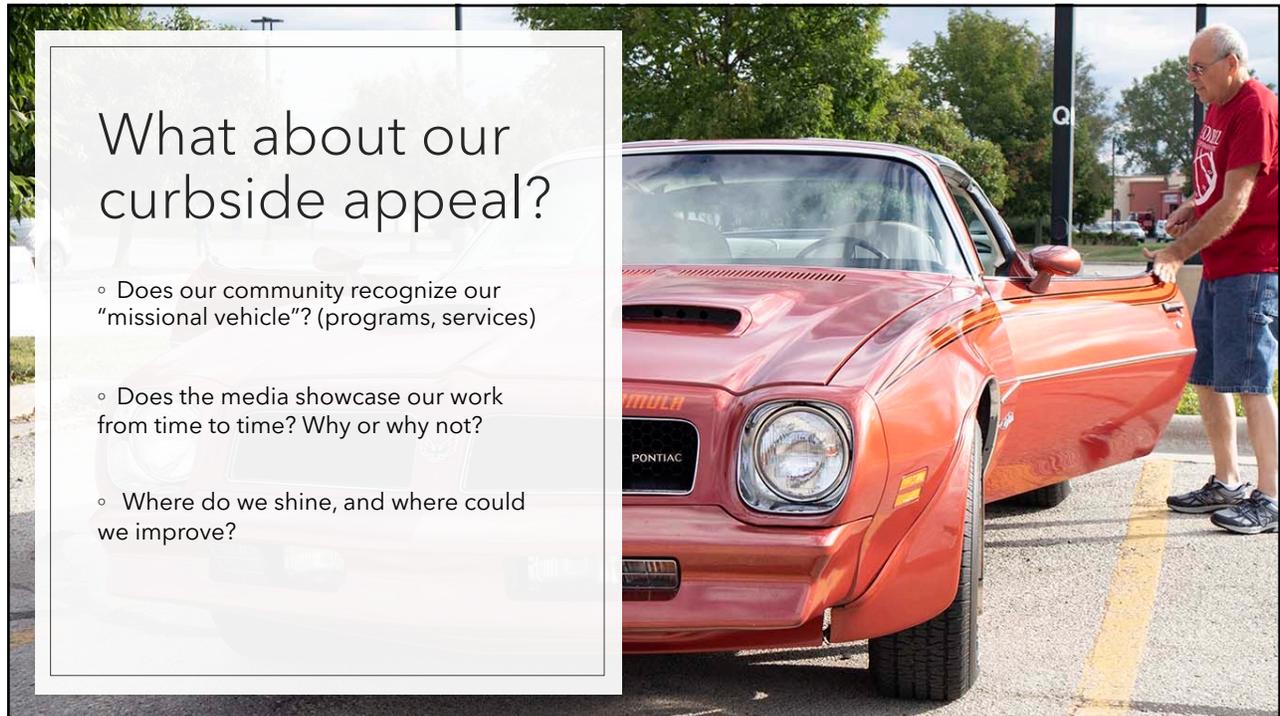
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Looking under the hood as an analogy...

- 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?

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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?

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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?

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6 Steps to Life-Changing **DECISIONS**

**DECISION
MAKING
PROCESS**

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!

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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.

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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

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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...

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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.



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SAMPLES OF WHEN YOU SHOULD DO AN ASSESSMENT

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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

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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 fulfil
- 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.

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WHEN
QUESTIONS ARE
FORMATTED
BASED UPON
BRAIN SCIENCE,
THE RESULTS ARE
WORTH THEIR
WEIGHT IN GOLD.



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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)

Intelligent
Questions with
Excellent
Framework
leads us toward
more objective
answers

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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)

Intelligent Questions with Excellent Framework leads us toward more objective answers

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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

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A group of stylized human figures, with one white figure in the center, set against a blurred background of more figures.

Who participates?

- Key staff
- Board members
- Past board members (?)
- Volunteers?

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The 14 Attributes of a Healthy Nonprofit

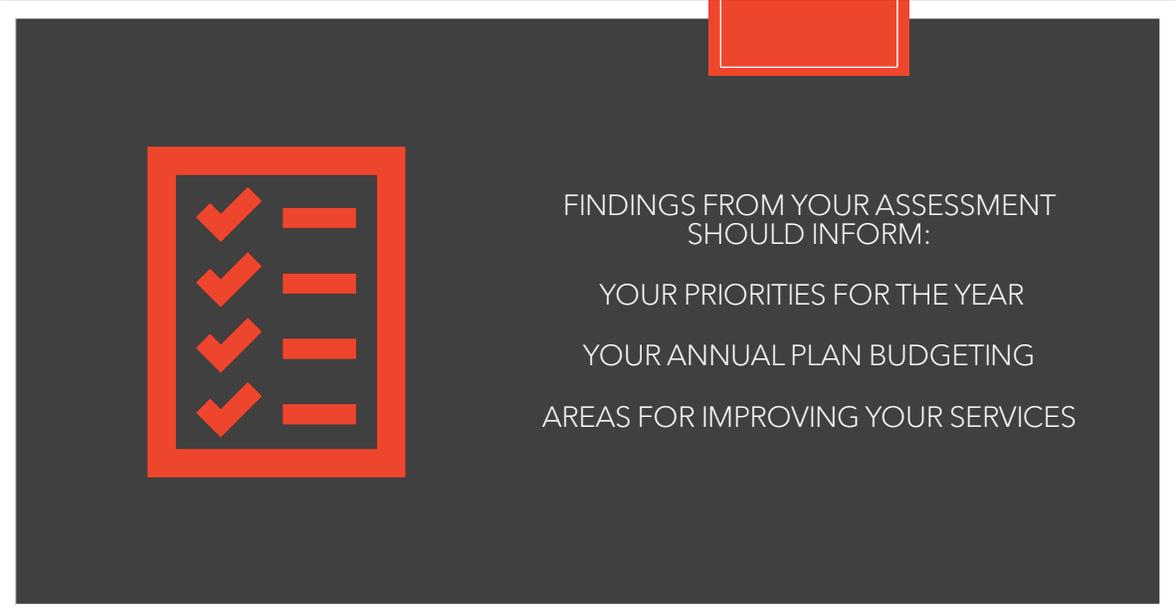
	MESSY	GROWING	HEALTHY	THRIVING
People	<p>Board Diversity Board has no diversity of skills nor reflects the community it serves.</p> <p>Board Responsibilities Board responsibilities are not defined. No orientation or onboarding process.</p> <p>Leader Relations The board chair and ED actively sabotage each other.</p> <p>Leadership Pipeline Neither the board nor staff has anybody prepared or groomed to take on leadership responsibilities when current leadership wants out.</p> <p>Performance Reviews No regular performance reviews or assessment for anybody (board or staff).</p> <p>Staff recruitment and retention Hard to find good people. No recruitment process.</p>	<p>Ad hoc board recruitment. Reactive based on current needs. No overall plan.</p> <p>Primitive orientation process. Either no committees or committees without goals/clear charge.</p> <p>ED feels compelled to do everything on her own and brings "completed" projects to the board.</p> <p>Board recruitment based on current organizational needs. Jobs posted on standard nonprofit recruitment websites. Not enough resources to recruit a great candidate pool.</p> <p>No board assessment. Very basic staff assessments.</p> <p>ED does all hiring. Rudimentary job descriptions. Limited outreach. Intentional appreciation of staff.</p>	<p>Developed composition matrix for the ideal board. Works to achieve it.</p> <p>Regular discussions and training regarding the role of the board. Onboarding process.</p> <p>Clear points of synergy around some aspects (board recruitment, some aspects of fundraising).</p> <p>Board active in recruiting those with leadership skills. Committee chairs held accountable and supported. Entire org involved in recruiting. Willingness to pay for excellence.</p> <p>Board has rudimentary assessment process in place.</p> <p>Hiring handled beyond ED level. HR compliance. Full job descriptions. Board and other stakeholders involved. Strong staff retention strategies in place.</p>	<p>Board diverse in skills and reflective of the community it serves.</p> <p>Board is clear on responsibilities, takes them seriously, and executes effectively.</p> <p>True partnership between board chair and ED.</p> <p>Board and staff have strong leadership pipeline and bench strength.</p> <p>Regular performance reviews / assessments.</p> <p>Seen as a workplace of choice.</p>
Money	<p>Financial Stability No financial stability. Trouble meeting payroll.</p> <p>Fundraising Reliant on a single, unstable fundraising stream.</p>	<p>Can make payroll but cashflow is inconsistent. Basic financial tracking. No cash reserve. Informal budget process.</p> <p>Basic fundraising plan with dedicated staffer leading, typically focused on events.</p>	<p>Smart, staff-driven budget process. Active board treasurer and finance committee. Cash reserve building.</p> <p>Board more involved and sophisticated about fundraising. Growing dev staff. Focus on bringing in larger donors (corporate, foundation, individual).</p>	<p>Board and staff partnership. Solid cash reserve. Strong positive cash flow. Operating expenses - at least 1 month in the bank and 3 - 6 months available as unrestricted cash balances. Little debt. No long term AB or AP. Endowment (7) at least 3x the operating budget.</p> <p>Fundraising streams are balanced, diverse, and sophisticated.</p>
Programs	<p>Mission-Centric Programs Programs aren't clearly mission-centric.</p> <p>Metrics No attempt to evaluate program impact.</p>	<p>Many programs are mission-centric but some are not and there's no plan on fixing this or ability to "just say no".</p> <p>Focus on "vanity metrics" and what's very easy to measure. No good infrastructure in place for measurement.</p>	<p>Strategic discussions about how to best invest program dollars. Ability to say no to programs that aren't mission-centric but some are still running.</p> <p>Plans and accountability in place to build out necessary measurement systems. Desired impact metrics identified. Basic dashboard created.</p>	<p>All programs are mission-centric.</p> <p>Can evaluate the impact of programs (quantitative and qualitative).</p>
Narrative	<p>Clear Brand Inability to state organizational mission in a way that is clear, concise, and attractive to the right people.</p> <p>Strategic Marketing / Stakeholders Few people know the org exists. No idea how to grow stakeholders or engage with existing ones.</p> <p>Public Champion ED is rambling, unclear.</p>	<p>Strong elevator pitch. Basic visual branding. Clarity on how to talk about the organization extends to staff.</p> <p>Basic website, email list, social media. Audience growing but haphazard and not strategic.</p> <p>ED is wonky. "Laundry list". No storytelling.</p>	<p>All visual branding is integrated and cohesive. Organization has a clear voice. Ongoing board training on how to talk about the organization. Beginning to understand stakeholder segments in a deeper way.</p> <p>Well designed and consistent website and media with a clear strategy and capacity to grow audience, authority, and stakeholder participation around the mission.</p> <p>ED is informative, interesting and clear, but not "sticky" or memorable.</p>	<p>Clear, strong, compelling, integrated, targeted, and highly visible external presence. Understood and communicated clearly by all stakeholders. Sophisticated and deep understanding of all stakeholder segments.</p> <p>Integrated and scalable strategy for growing, segmenting and engaging stakeholders in the work.</p> <p>ED is visible, vocal, and effective public champion/voice for the org. Great storyteller.</p>
Strategy	<p>Strategic planning No long-term strategy.</p>	<p>Staff sets broad goals for next few years. Board not really involved. Motivation is to prove to funders there's a plan.</p>	<p>Solid, but limited plan developed jointly by staff and a board committee with no goals set for the board and no outside resources.</p>	<p>Thoughtful long-term strategy developed jointly by board and staff that sets inspiring vision.</p>

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.

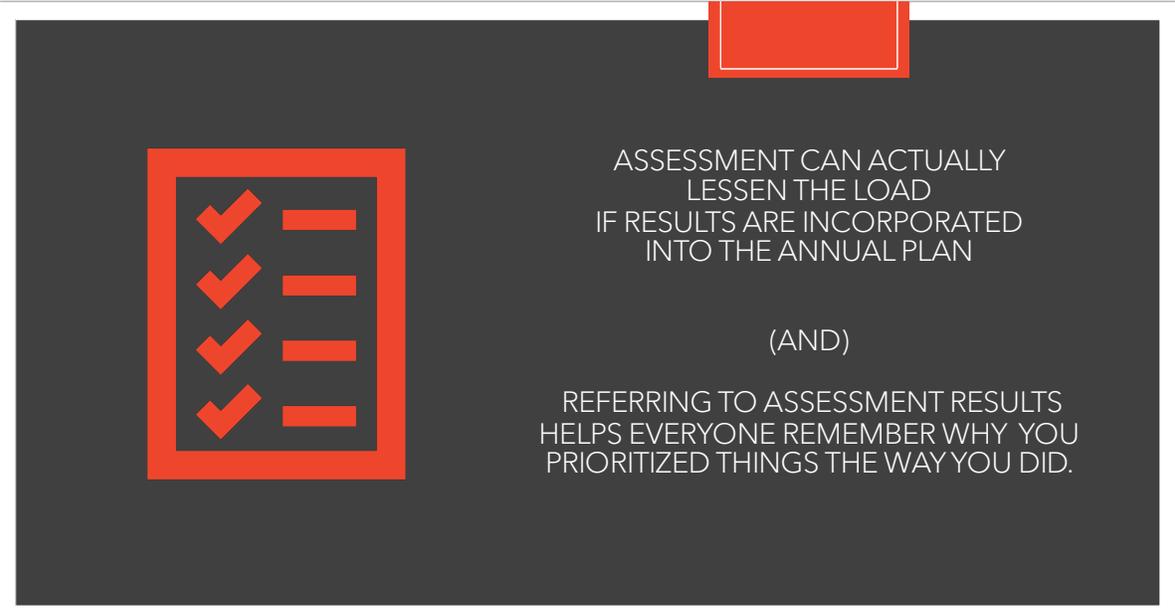
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FINDINGS FROM YOUR ASSESSMENT SHOULD INFORM:

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

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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.

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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?

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Specializing in Organizational and Resource
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<https://RoddaConsulting.com>
Email: jrodda@rodداconsulting.com

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