

Organizational Capacity Assessment Tool
Screenshots of v2

3.4.15

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-152 Days left

OCAT Main Menu

Logout

ASPIRATIONS
4 of 4 questions answered

How powerful is our vision as a guiding view of the future?

How effective is our mission?

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
15 of 15 questions answered

MARKETING AND COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
15 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND

NAVIGATION

ASPIRATIONS

How powerful is our vision as a guiding view of the future?

Question 1

Is our vision clear?

1

Little shared understanding of what organization aspires to become or achieve beyond the stated mission

2

General shared understanding of what organization aspires to become or achieve organizational aspirations, but rarely used to direct actions or set priorities – it exists mainly "on the wall"

3

Clear and specific understanding of what organization aspires to become or achieve; Held by many within the organization and often used to direct actions and set priorities

4

Clear, specific, and inspiring understanding of what organization aspires to become or achieve; Broadly held within organization and consistently used to direct actions and set priorities

Not Applicable

Do Not Know

Question 2

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Submit ?

Save progress & finish later

Next →

ASPIRATIONS

4 of 4 questions answered



How powerful is our vision as a guiding view of the future?



How effective is our mission?



STRATEGY

4 of 13 questions answered



LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND

NAVIGATION

ASPIRATIONS

How powerful is our vision as a guiding view of the future?

Question
1

Will what we're trying to accomplish inspire others and be of significant benefit?

Question
2

1

Vision may not exist; If it does, it is not inspiring or of clear benefit to others



2

Vision exists but **falls short** of reflecting an inspiring view of the future and of articulating a significant benefit for others

3

Vision reflects an **inspiring view** of the future and **clearly articulates** a benefit to others

4

Vision reflects an **inspiring view of the future** that **engages and motivates** others outside of the organization to action.

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



1.2

1.3 1.31.

ASPIRATIONS

4 of 4 questions answered



How powerful is our vision as a guiding view of the future?



How effective is our mission?



STRATEGY

4 of 13 questions answered



LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION

STRUCTURE AND

NAVIGATION

ASPIRATIONS

How effective is our mission?

Question 3

3

How strong is our mission?

1

☐ No written mission or limited expression of the organization's reason for existence

2

☐ Some expression of organization's reason for existence that reflects its values and purpose, but **may lack clarity or specificity**

Question 4

4

3

☐ Clear expression of organization's reason for existence which **reflects** its values and purpose

4

☒ Clear expression of organization's reason for existence which describes an **enduring reality** that reflects its values and purpose☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS

4 of 4 questions answered

How powerful is our vision as a guiding view of the future?

How effective is our mission?

STRATEGY

4 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND

NAVIGATION

ASPIRATIONS

How effective is our mission?

Question 3

Does our mission guide our daily work?

1

☐ Few in organization can articulate the reason for being or the mission **is rarely referred to**

2

☐ Few in organization can articulate the reason for being; There is **no broad agreement** around the mission or it is **rarely** referred to

Question 4

3

☒ Many within organization can articulate the reason for being and it is **often** referred to

4

☐ All those in the organization can articulate the reason for being, it is **frequently** referred to, and it is the **guiding principle** underlying any significant decision☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
4 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

FUNDING
0 of 11 questions answered

VALUES
0 of 7 questions answered

LEARNING AND INNOVATION
0 of 15 questions answered

MARKETING AND COMMUNICATION
0 of 6 questions answered

NAVIGATION

STRATEGY

How effective is our theory of change?

Question 1

Is our theory of change based on credible evidence?

1

Theory of change **does not have a sound basis** in facts, but may be based rather on historical approaches or specific visions of one or few individuals

2

Theory of change **based on generally held beliefs** that impact only the specific area; Research exists, but does not reflect the latest thinking on the given topic; **Fit** within the landscape of other players and nonprofits is **minimally considered**

Question 2

Question 3

3

Theory of change **based on recent evidence** from the field **and an understanding of the organization's role and opportunity for impact** within the landscape of other players and nonprofits

4

Theory of change **is driven by the latest research** and **evolves over time** as the research, organization, and broader context evolves to **constantly reflect the most impactful way** to advance the organization's mission and vision

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
4 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

FUNDING
0 of 11 questions answered

VALUES
0 of 7 questions answered

LEARNING AND INNOVATION
0 of 15 questions answered

MARKETING AND COMMUNICATION
0 of 6 questions answered

NAVIGATION

STRATEGY

How effective is our theory of change?

Question
1

Do we have a logical and commonly understood approach that reflects the most impactful way our organization can advance our vision and mission?

Question
2

1

There is **no one specific approach** that is clearly defined or understood for advancing the organization's mission and vision; Activities are a collection of items loosely connected to the vision and mission

2

A **general idea** for how to **best advance** the organization's mission and vision exists, around which **activities are loosely oriented**

Question
3

3

A **specific approach for best advancing** the organization's mission and vision exists, and is used to narrow **the organization's potential scope** of activities

4

A **specific and widely understood approach for best advancing** the organization's mission and vision exists and is actively used to shape the activities in which the organization engages; activities that do not align with this theory of change are rarely undertaken

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS

4 of 4 questions answered



STRATEGY

4 of 13 questions answered



How effective is our theory of change?



Do we have a strong overall strategy?



Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

How effective is our theory of change?

Question
1

Do we have a clear articulation of how our actions (inputs) translate into specific outputs and further into the desired outcomes?

Question
2

1

Organization has **minimal strategy** to implement the theory of change. **Linkage between Inputs** (e.g., job trainings held), **outputs** (e.g., increased skills) and **outcomes** (e.g., increased long-term income for low-income individuals) **has not been explicitly mapped and is not well understood**; Organization **focuses** planning and discussion **primarily on Inputs**

2

Organization **has articulated the linkage** between inputs, outputs, and outcomes in a general way; Logic model **understood by a few** individuals and is **rarely discussed or revisited**

Question
3

3

Organization's **has high-level strategy** to implement the theory of change. Organization **has explicitly articulated the linkage** between inputs, outputs and outcome measures in a detailed way; Logic model is **understood by most** of the organization and is **sometimes discussed**

4

Organization's strategy has a **practical plan for implementing** the theory of change. (e.g., logic model is effectively translated into measurable outputs and outcome measures **and widely understood**; Organization **regularly tests and refines the assumptions** on linkages with research and results

☐

Not Applicable

☒

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
4 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

FUNDING
0 of 11 questions answered

VALUES
0 of 7 questions answered

LEARNING AND INNOVATION
0 of 15 questions answered

MARKETING AND COMMUNICATION
0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have a strong overall strategy?

Question
4

Do we have a logical and commonly understood mechanism to achieve our vision?

Question
5

1 The process towards achieving the organization's mission and vision is **not well defined** or **not well understood**; **No sense of organizational fidelity to theory of change**

2 **Plausible, though lengthy or indirect** path toward realizing the organization's vision and mission defined; Held by **only a few** or \"on the wall\" but **rarely used to direct actions** or set priorities

Question
6

3 **Somewhat clear** path toward realizing the organization's vision and mission defined, with a **basic conception** of the steps of the change process; Understood **by some** within the organization and **sometimes used** to direct actions and set priorities

4 **Clear and specific** path toward realizing the organization's vision and mission defined, including the basic steps of the change process and their logical order; **Broadly understood** within organization and **consistently used** to direct actions and set priorities; Strong sense of organizational fidelity to theory of change

Question
7

Question
8

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

ASPIRATIONS

4 of 4 questions answered

STRATEGY

4 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have a strong overall strategy?

Question
4

Do we have a plan of action to achieve our goal, vision and mission?

1

Strategy is **nonexistent, unclear, or Incoherent** (largely a set of scattered initiatives); Strategy has **no influence** over day-to-day behavior, strategy includes no long-term plan to build future capacity

2

Strategy **exists** but is either **not clearly** linked to mission, vision, and overarching goals, **lacks** coherence, or is **not** easily actionable; Strategy is **not** broadly known and has **limited** influence over day-to-day behavior

Question
5Question
6

3

Coherent strategy has been developed and **is linked** to mission and vision, as well as **guided** by general goals, but is **not** fully actionable; Strategy is **mostly** known and day-to-day behavior is **partly** driven by it

4

Organization has **clear, coherent medium-to long-term** strategy that is both **actionable and linked** to overall mission, vision, and **driven by strong**, overarching goals; Strategy is **broadly** known and **consistently helps** drive day-to-day behavior at all levels of organization; Strategy also includes long-term plan to build future capacity

Question
7Question
8

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
5 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

FUNDING
0 of 11 questions answered

VALUES
0 of 7 questions answered

LEARNING AND INNOVATION
0 of 15 questions answered

MARKETING AND COMMUNICATION
0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have a strong overall strategy?

Question 4

Do we have the right elements to build a strong strategy?

1

Organization's strategy is **not meaningfully** aligned with any basic understanding of the value the organization creates for others, the position it occupies within the field, its internal resources and capabilities, and risks at hand

2

Organization's strategy is only **loosely based on some** of the following: an understanding of the value the organization creates for others, the position it occupies within the field, its internal resources and capabilities, and risks at hand

Question 5

Question 6

Question 7

Question 8

3

Organization's strategy is **based on, but not always** rigorously aligned with, **most** of the following: a **strong** understanding of the value the organization creates for others, the position it occupies within the field, its internal resources and capabilities, and risks at hand

4

Organization's strategy is **based on and rigorously** aligned with its **detailed and regularly-assessed** understanding of **all** of the following: the value the organization creates for others, the position it occupies within the field, its internal resources and capabilities, and risks at hand

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 4, 2013

-1 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

6 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have a strong overall strategy?

Question 4

Do we have robust goals linked to our strategy?

1

Strategy (if it exists) **not explicitly** translated into small set of concrete goals

2

Strategy translated into a **concrete** set of goals, though goals may be **vague**, or **too numerous**

3

Strategy translated into **small set** of concrete goals

4

Strategy translated into **clear set of (up to three)** goals that organization aims to achieve and for which **success can be measured**

Not Applicable

Do Not Know

Question 5

Question 6

Question 7

Question 8

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

Back

Next

2.7

ASPIRATIONS
4 of 4 questions answered

STRATEGY
7 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

FUNDING
0 of 11 questions answered

VALUES
0 of 7 questions answered

LEARNING AND INNOVATION
0 of 15 questions answered

MARKETING AND COMMUNICATION
0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have a strong overall strategy?

Question
4

Are our goals inspiring and aligned to our vision?

1

Goals are nonexistent or are **uninspiring** and would **not** result in any significant impact in line with the organization's reason for being

2

Goals are **achievable**, but **uninspiring** or **almost unattainable**

Question
5Question
6

3

Goals are **ambitious and inspiring, yet achievable** and represent a **significant** benefit in line with the organization's reason for being

4

Goals are **ambitious and inspiring, yet achievable** and represent a **transformational** benefit in line with the organization's reason for being

Question
7Question
8

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS

4 of 4 questions answered

STRATEGY

8 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

Do we choose to engage in the right activities to further our organization's mission?

Question
9

Do our activities align with our purpose?

1

Core activities (e.g., programs and services) are **vaguely** defined and **lack** clear alignment with mission and goals; Programs **seem scattered** and **largely unrelated** to each other

2

Most activities are **well** defined and can be **solidly linked** with mission and goals; Program offerings **may be somewhat scattered** and **not fully integrated** into clear strategy

3

Core activities are **well** defined and aligned with mission and goals; Program offerings **fit together well** as part of clear strategy

4

All activities are **well** defined and **fully** aligned with mission and goals; Program offerings are **clearly linked to one another and to overall strategy**; **Synergies** across programs are **captured**; **Any scattered** activities are **reconfigured or discontinued**

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



Firefox McKinsey & Company Organizational C... https://ocat.mckinseysociety.com/take-survey/263

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts Z QB RT Sched1 SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL DEADLINE OCTOBER 4, 2013 -1 Days left Logout

ASPIRATIONS 4 of 4 questions answered

STRATEGY 9 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS 0 of 43 questions answered

FUNDING 0 of 11 questions answered

VALUES 0 of 7 questions answered

LEARNING AND INNOVATION 0 of 15 questions answered

MARKETING AND COMMUNICATION 0 of 6 questions answered

NAVIGATION

STRATEGY

Can we grow?

Question 10 Can we identify scaling opportunities?

1 No assessment of possibility of scaling up existing programs

2 Limited assessment of possibility of scaling up existing programs using **Informal** criteria (e.g., demand in other sites, some data supporting program quality)

3 Occasional assessment of possibility of scaling up existing programs using **clearly-defined** criteria (e.g., level of success expected prior to expansion)

4 Frequent assessment of possibility of scaling up existing programs using **clearly-defined** criteria (e.g., level of success expected prior to expansion, probability of success) **agreed to by Board** and key sponsors

Not Applicable Do Not Know

Question 11

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later ? Save progress & finish later Back Next

Firefox

McKinsey & Company Organizational C...

https://ocat.mckinseysociety.com/take-survey/263

Google

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 4, 2013

-1 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

10 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

Can we grow?

Question 10

Do we have the ability to expand the scope of our operations successfully?

Question 11

1 **Limited** understanding of factors needed to scale successfully; **Track record of unsuccessful** expansion; No plan for growth

2 **Limited** understanding of key factors needed to scale successfully (e.g., funding, talent, environmental conditions), minimal plan for growth

3 **General** understanding of key factors needed to scale successfully (e.g., funding, talent, environmental conditions); **Promising track record** of successful expansion in the past, moderate plan for growth

4 **Clear program-by-program** understanding of key factors needed to scale successfully (e.g., funding, talent, environmental conditions); **Strong track record** of successful expansion in the past; Developed plan for growth

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

2.11

Firefox | McKinsey & Company Organizational C... | https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL DEADLINE **OCTOBER 4, 2013** -1 Days left Logout

ASPIRATIONS 4 of 4 questions answered

STRATEGY 11 of 13 questions answered

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS 0 of 43 questions answered

FUNDING 0 of 11 questions answered

VALUES 0 of 7 questions answered

LEARNING AND INNOVATION 0 of 15 questions answered

MARKETING AND COMMUNICATION 0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have an effective process to develop and revise our strateg plan?

Question 12 Do we have a good process in place to develop and continually revise our strategic plan?

Question 13

1 **Limited** ability and tendency to develop strategic plan, either internally or via external assistance (if strategic plan exists)

2 **Some** ability and tendency to develop strategic plan either internally or via external assistance

3 **Ability** to develop and refine **concrete and realistic** strategic plan and do so **somewhat regularly**; **Some** internal expertise in strategic planning or access to relevant external assistance

4 **Ability** to develop and refine **concrete, realistic and detailed** strategic plan on a **regular basis**; Critical **mass** of internal expertise in strategic planning, or efficient use of external, sustainable, highly qualified resources

Not Applicable Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later ? Save progress & finish later Back Next

2.12

Firefox

McKinsey & Company Organizational C...

+

[https://ocat.mckinseysociety.com/take-survey/263](#)

☆

Google

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE

OCTOBER 4, 2013

-1 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

✓

STRATEGY

12 of 13 questions answered

✓

How effective is our theory of change?

Do we have a strong overall strategy?

Do we choose to engage in the right activities to further our organization's mission?

Can we grow?

Do we have an effective process to develop and revise our strategic plan?

LEADERSHIP, STAFF AND VOLUNTEERS

0 of 43 questions answered

FUNDING

0 of 11 questions answered

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

NAVIGATION

STRATEGY

Do we have an effective process to develop and revise our strateg plan?

Question 12

Do we use our strategic plan in making day-to-day decisions?

1

Strategic plan is **not used** in a meaningful way and/or the plan and planning process are **not** well known throughout the organization; Plan is **static**

2

Strategic plan **roughly** directs management decisions; Staff has **awareness** of the planning process, but **little clarity** on the details of the plan; Plan is **updated only when faced with significant** changes in operating context

3

Strategic plan **generally** used to guide management decisions; Staff **understands** and **generally embraces** the resulting organizational direction; Plan is **regularly revisited**

4

Strategic plan used **extensively** to guide management decisions; Staff has **sense of ownership** over the plan and also **understands and embraces** the resulting organizational direction; Plan is **dynamic and anticipates multiple scenarios of operation**

Not Applicable

Do Not Know

Question 13

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

?

Save progress & finish later

Back

Next

2.13

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
0 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

Question 1

Does the leadership team have the skills and appetite for analytical and strategic thinking?

Question 2

1

Are **uncomfortable with complexity and ambiguity** and attempt to reduce or avoid where possible; **Rely mainly on Intuition** rather than strategic analysis

2

Are **able to cope with some** complexity and ambiguity; **Able to analyze** but do not yet generate strategies

Question 3

3

Able to assimilate complex information and distill to core issues; **Welcome ambiguity** and are comfortable dealing with the unknown; Develop **robust strategies**

4

Have **keen and exceptional ability to synthesize complexity**; Make **Informed decisions** in ambiguous, uncertain situations; **Develop strategic alternatives** and identify associated rewards, risks, and actions to lower risks

☐
Not Applicable

☐
Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

?

Save progress & finish later

Back

Next

3.1 javascript:void(0);

Firefox McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...
 https://ocat.mckinseysociety.com/take-survey/263 some random bar seattle
 Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL DEADLINE **OCTOBER 31, 2013** -20 Days left Logout

ASPIRATIONS 4 of 4 questions answered
 STRATEGY 13 of 13 questions answered
LEADERSHIP, STAFF AND VOLUNTEERS 1 of 43 questions answered

Does the leadership team have the skills to be effective?
 Do the CEO and leadership team have the experience to be effective?
 How effective are the CEO/ED and leadership team?
 Does the leadership team deliver impact?
 Is there a healthy working relationship amongst the senior leadership team?
 Are the right people on the Board with the right level of engagement?
 Are the composition, structure and operations appropriate for our organization?
 Does the Board provide appropriate oversight and leadership?
 Do we have the right people with the right skills?
 How well do we bring in talent?

LEADERSHIP, STAFF AND VOLUNTEERS
 Does the leadership team have the skills to be effective?

Question 1 Does the leadership team have a healthy enthusiasm for professional growth?

Question 2 1 No appetite or openness to new ideas and experiences for personal growth 2 Limited openness to new ideas and experiences for personal growth

Question 3 3 Seeks new learning and personal development opportunities 4 Actively works to better oneself with goal of increased effectiveness; Outstanding track record of learning and personal development

Question 4 Not Applicable Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later ? Save progress & finish later Back Next

3.2

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

2 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the leadership team have the skills to be effective?

Question 1

Does the leadership have strong financial judgment?

1

Have **difficulty** considering financial implications of decisions; **Struggle to balance** financial needs and social impact objectives

2

Draw **appropriate conclusions** after studying all the facts; Understand **basic financial concepts** and drives for financial impact of **major** decisions; **Tend to prioritize either** financial or social objectives, but not both

3

Have **sound financial judgment**; **Consistently** considers financial implications of decisions; **Focus** on better ways to use **existing** resources to deliver highest impact possible

4

Have **exceptional** financial judgment; Have **keen, almost intuitive sense for financial implications** of decisions; **Constantly seek and find new** opportunities to improve impact with given resources

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

3 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the leadership team have the skills to be effective?

Question 1

Does the leadership team manage their time to lead effectively?

1

Are **consistently over-scheduled** and late; Either **distracted by** details or too broad to engage meaningfully

2

Sometimes struggle to balance long-term critical priorities and near-term issues, making time for the most critical issues only when pressed; Day-to-day priorities **often focused on most urgent items, leaving Insufficient time** for important big-picture issues

3

Typically balance long-term critical priorities and near-term issues that need to be addressed, though sometimes distracted by details; **Usually prioritize time to best serve the long-term interests** of the organization and its constituents

4

Effectively balance long-term critical priorities and near-term issues that need to be addressed; **Consistently able to prioritize time to best serve the long-term interests** of the organization and its constituents

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

4 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Do the CEO and leadership team have the experience to be effective?

Question 5

Does the leadership have meaningful depth and breadth of experience?

Question 6

Question 7

1

CEO has **limited experience** in nonprofit management and **few relevant capabilities** from other fields; **Little evidence of ability to use Innovative principles (where relevant) to manage and find solutions to social issues** or tends to **use the status quo as primary approach**

2

CEO has **some relevant experience** in nonprofit management and **some relevant capabilities** from other fields; **Emerging ability to use Innovative principles (where relevant) to manage and find solutions to social issues**, though at times focus may be **constrained by** the status quo

3

CEO has **significant** experience in nonprofit management and **many relevant capabilities** from other fields; **Significant evidence of ability to use Innovative principles (where relevant) to manage and find solutions to social issues**

4

CEO is **highly experienced** in nonprofit management with a comprehensive and **deep understanding of the sector**, and **many distinctive capabilities** from other fields (e.g., for-profit, academia); **Exceptional evidence of ability to use Innovative principles (where relevant) to manage and find solutions to social issues** and committed to driving transformational change

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

5 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Do the CEO and leadership team have the experience to be effective?

Question 5

Does the CEO have influence and networks to drive the organization?

1

CEO is **unknown externally** or uses organization to **further recognition for personal rather than** organizational gains

2

CEO has **limited** recognition in the nonprofit community

3

CEO has **some local or national** recognition as a leader in the sector, though may **focus too much on individual recognition** at times

4

CEO is recognized locally or nationally as a **leader and influencer** in the sector, but **does not let** the external recognition **distract** from promotion of organizational aims

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

ASPIRATIONS
4 of 4 questions answered
STRATEGY
13 of 13 questions answered
LEADERSHIP, STAFF AND VOLUNTEERS
7 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Do the CEO and leadership team have the experience to be effective?

Question 5
Question 6
Question 7

Does the leadership team have diverse experience?

1 Team has **very limited capabilities** and track record from other sectors (nonprofit, academia, corporate, government, etc.)
2 Team has **some relevant capabilities** and track record from **two or more** sectors
3 Team has **significant and relevant capabilities** and track record from nonprofit or other sectors
4 Team has **outstanding and relevant capabilities** and track record from within the nonprofit **and** other sectors

☐ Not Applicable
☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later
Save progress & finish later
Back
Next

3.7

javascript:void(0);

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

7 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

LEADERSHIP, STAFF AND VOLUNTEERS

How effective are the CEO/ED and leadership team?

Question 8

Does the leadership team effectively apply key leadership skills?

1

Team has **difficulty building trust and rapport** with others in organization ; **Micromanages** projects; **Reluctant to share** own experiences as a means of coaching and developing others

2

Team is **responsive to opportunities from others** in organization to work together; Expresses **confidence in others'** ability to be successful; **Open to sharing own experiences** and expertise

3

Team **actively and easily builds rapport and trust** with others in organization; Effectively **encourages others** to succeed; **Gives others freedom** to work in their own style, try out new ideas, and grow

4

Team consistently **establishes successful, win-win relationships**; Delivers **consistent, positive and reinforcing messages to motivate** people; Able to **let others make decisions** and take charge; Finds or **creates special opportunities to develop others** in organization

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

ASPIRATIONS
4 of 4 questions answered
STRATEGY
13 of 13 questions answered
LEADERSHIP, STAFF AND VOLUNTEERS
8 of 43 questions answered

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS
How effective are the CEO/ED and leadership team?

Question 8

Are members of the leadership team effective interpersonally?

1
Most team members **fail to show respect** for others consistently, may be **openly judgmental** or critical; Have **difficulty influencing without using power**, limited charisma or influence

2
Most team members **earn the respect of others**; Take time to build relationships; Have presence; Are **able to influence and build support** using limited set of influencing skill styles

3
Most team members are **respected and sought out by others** for advice and counsel; Have strong presence and charisma; Use **multiple approaches to get buy-in** and appreciate the impact of their words or actions

4
Most team members are viewed **as having outstanding interpersonal skills**; Use a diversity of communication styles, including exceptional charisma, to **Inspire others** and achieve impact; Exceptionally self-aware

☐ Not Applicable

☐ Do Not Know

Question 9

Question 10

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later
Save progress & finish later
Back
Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

9 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

LEADERSHIP, STAFF AND VOLUNTEERS

How effective are the CEO/ED and leadership team?

Question 8

Does the leadership inspire the organization?

1

Low energy level and commitment; Little continued attention to organizational vision

2

Deep passion for work drives focus, though sometimes may result in missing important issues and clouding judgment and priorities for long-term success

3

Inspiringly energetic; Shows constant, visible commitment to organization and its vision; Excites others around vision

4

Contagiously energetic and highly committed; Lives the organization's vision; Compellingly articulates path to achieving vision that enables others to see where they are going

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts Z QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

10 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the leadership team deliver impact?

Question 11

Does the leadership take appropriate action in a timely manner and prioritize for impact?

Question 12

1

Consistently act hastily without contemplating consequences or resource implications, or very hesitant to take any action

2

Consistently delay decision making and are reluctant to change the status quo

Question 13

3

General sense of urgency in addressing issues, rapidly moving from decision to action, though decision-making process may take too long or action may be hasty from time to time

4

Consistently anticipate possible problems; Have sense of urgency about upcoming challenges and act consistently with efficiency and thoughtfulness in a timely manner

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

3.11

javascript:void(0);

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts Z QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

11 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the leadership team deliver impact?

Question 11

Can the leadership guide the organization through change?

1

Mandate rather than lead change

2

Understand Implications and Impact of change on people

3

Develop and Implement actions to overcome resistance to change

4

Communicate compelling need for change that creates drive; Align entire organization to support change effort

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

12 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the leadership team deliver impact?

Question 11

Does the leadership deliver results?

1

Consistently **fail** to deliver pre-determined goals and objectives or **results at the expense** of organizational values or long-term impact

2

Consistently deliver **satisfactory** results given resources

3

Consistently deliver **strong** results given resources

4

Consistently deliver **results beyond what is expected** through creative allocation and utilization of given resources

Not Applicable

Do Not Know

Question 12

Question 13

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
13 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Is there a healthy working relationship amongst the senior leadership team?

Question 14

Question 15

Is the senior leadership team able to work together effectively? (As a guideline, senior leadership refers to the executive director and all those who report directly to him/her. In small organizations, this may only include the executive director)

1
Dysfunctional Interactions, which often include lack of communication, lack of transparency, or lack of respect for others or their ideas and contributions

2
Functional team characterized by transparent communication; **Diversity of opinions** sought and respected; **Division of labor and decision-making processes exist, but are vague**; Team may struggle under pressure

3
Well-functioning team characterized by effective, transparent, and frequent communication; **Diversity of opinions** sought and valued; **division of labor and decision-making processes are clear**; Team **manages well** through pressure

4
Highly-functioning team characterized by effective, transparent, and frequent communication; **diversity of opinions** sought and valued; **highly efficient division of labor and decision-making**; Team **highly effective under pressure**

☐ Not Applicable

☒ Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

3.14

javascript:void(0); bring in talent?

Firefox | McKinsey & Company Organizationa... | Pandora One - Listen to Pandora with... | +

https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | Screencast | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL **DEADLINE OCTOBER 31, 2013** -20 Days left **Logout**

ASPIRATIONS 4 of 4 questions answered ✓

STRATEGY 13 of 13 questions answered ✓

LEADERSHIP, STAFF AND VOLUNTEERS 14 of 43 questions answered ✓

Does the leadership team have the skills to be effective? ☐

Do the CEO and leadership team have the experience to be effective? ☐

How effective are the CEO/ED and leadership team? ☐

Does the leadership team deliver impact? ☐

Is there a healthy working relationship amongst the senior leadership team? ☐

Are the right people on the Board with the right level of engagement? ☐

Are the composition, structure and operations appropriate for our organization? ☐

Does the Board provide appropriate oversight and leadership? ☐

Do we have the right people with the right skills? ☐

How well do we bring in talent? ☐

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Is there a healthy working relationship amongst the senior leadership team?

Question 14 Does the CEO serve a critical role, while not being irreplaceable?

Question 15

1 **Very strong dependence** on CEO/executive director; Organization would cease to exist without his/her presence ☐

2 **High dependence** on CEO/ executive director; Organization would continue to exist without his/her presence, but likely in a very different form; Relationships and institutional knowledge **not widely shared or documented** ☐

3 **Limited dependence** on CEO/executive director; Organization **would continue along the same trajectory** without his/her presence **but areas** such as fund-raising or operations would likely **suffer significantly** during transition period; **No member of management team** could clearly take on CEO/ED role; Relationships and institutional knowledge **not widely shared or documented** ☐

4 **Reliance** rather than dependence on CEO/ executive director; **Smooth transition** to new leader is possible if needed, including fundraising and operations able to continue **without major problems**; senior management team **capable of filling in during transition** period; Several members of management team could potentially take on CEO/ED role; Institutional relationships and knowledge is **well documented** ☐

☐ Not Applicable ☐ Do Not Know

Want to leave a comment?

Skip this section & answer later ? Save progress & finish later Back Next

3.15

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

15 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the right people on the Board with the right level of engagement?

Question 16

Does the Board have the needed diversity, expertise and connections?

Question 17

1

Membership with **limited diversity** in fields of practice, expertise and background, drawn from a **narrow spectrum** of constituencies (i.e., only one of nonprofit, academia, corporate, government, etc.); **Little or no relevant experience**

Question 18

2

Some diversity in fields of practice and background; Membership represents a **few different** constituencies; Includes **some local high-profile names** whose reputation and connections are **valuable** to the organization at times

Question 19

3

Good diversity in fields of practice, expertise and background; Membership **represents most constituencies**; Includes **many local high-profile names** whose reputation and connections are **valuable** to the organization at times

4

Membership with **broad variety** of fields of practice expertise and background, and drawn from the **full spectrum** of constituencies; Includes **functional and program content-related expertise**, as well as **nationally high-profile names** whose reputation and connections are **very valuable** to the organization

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

3.16

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

16 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the right people on the Board with the right level of engagement?

Question 16

Is the Board clearly committed to serve our mission and vision?

1

Low commitment to organization's success, vision and mission; Meetings **Infrequent** and/or **poorly** attended; Low level of engagement in organization's activities

2

Moderate commitment to organization's success, vision and mission; **Regular, purposeful** meetings and attendance is **generally good**; Basic level of engagement in organization's activities

3

Good commitment to organization's success, vision and mission, and behavior to suit; **Regular, purposeful** meetings and attendance is **consistently good**; Moderate level of engagement in organization's activities

4

Outstanding commitment to the organization's success, mission and vision; **In-person meetings occur regularly with good attendance**; High level of engagement in organization's activities

Question 17

Question 18

Question 19

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

3.17

Firefox

McKinsey & Company Organizationa... x Pandora One - Listen to Pandora with... x

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

17 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the right people on the Board with the right level of engagement?

Question 16

Does the Board meaningfully contribute to our organization's resources? (Contributions may include time, financial resources, access to networks and social capital, hands-on work)

Question 17

1

Minimal Board contribution beyond participation; Board primarily fulfills legal requirement

2

Organization **benefits** from the **resources** provided from **some members** of the board; Board members **typically respond favorably when asked** to contribute

Question 18

3

Organization **benefits** from the **breadth of resources**, provided by **most members** the board; Board members **respond favorably when asked** to contribute and **a few** sometimes **pro-actively suggest** ways to contribute

4

Organization **benefits greatly** from the **breadth of resources**, provided from the board; **expectation to contribute is made clear prior to joining** the Board and communicated in job description; Board members **proactively suggest** ways to contribute

Question 19

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your

Skip this section & answer later

Save progress & finish later

Back

Next

3.18

Firefox | McKinsey & Company Organizationa... | Pandora One - Listen to Pandora with... | +

https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | Screencast | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company | ORGANIZATIONAL CAPACITY ASSESSMENT TOOL | DEADLINE **OCTOBER 31, 2013** -20 Days left | Logout

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
19 of 43 questions answered

Do the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the right people on the Board with the right level of engagement?

Question 16
Do Board members serve as effective representatives for our organization?

Question 17

Question 18

Question 19

1 Board primarily fulfills legal requirement

2 Board members acknowledge and **advocate for the organization if asked; Some work hard to follow-through** on commitments to leverage personal networks on behalf of organization **when asked** (e.g., fundraising connections, access to professional development and growth opportunities, access to mission-critical stakeholders); **Some are well-versed** enough to be effective ambassadors

3 Board members advocate for the organization **frequently, sometimes without being asked; Work hard, though not always able, to follow-through on commitments** to harness personal networks on behalf of organization; **Most are well-versed** enough in organizational issues to be **effective ambassadors** though some may lack depth of knowledge

4 Board members **constantly seek opportunities to promote** organization and its objectives **unprompted; Consistently follow-through on commitments to harnesses personal network** on behalf of organization; Are **well-versed enough** in organizational issues to be **effective ambassadors**

Not Applicable

Do Not Know

Skip this section & answer later ? Save progress & finish later Back Next

3.19

Firefox

McKinsey & Company Organizationa... x Pandora One - Listen to Pandora with... x

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

19 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the composition, structure and operations appropriate for our organization?

Question 20

Do we select Board members effectively?

1

Board members are **selected informally** (e.g., through personal connections and with minimal vetting); Selection is not aligned with the strategic plan; No job description is provided

2

A **formal selection process** exists, though is at times procedural without much scrutiny; Selection is minimally aligned with the strategic plan; Basic job description is provided

3

A **formal selection process** exists and **increases the quality and fit** of board members; Selection is moderately aligned with the strategic plan; Generic job description is provided (e.g., not tailored for unique contribution of board member)

4

Board members are selected through a **rigorous process guided by a strategy** to ensure quality and fit of board members; And selection is informed by the strategic plan and helps further organization's objectives; Clear job description is provided and is tailored for each individual member's role and potential contribution

Not Applicable

Do Not Know

Question 21

Question 22

Question 23

Question 24

Question 25

Skip this section & answer later

Save progress & finish later

Back

Next

3.20

javascript:void(0); bring in talent?

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

20 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the composition, structure and operations appropriate for our organization?

Question 20

Question 21

Question 22

Question 23

Question 24

Question 25

Do we onboard Board members effectively?

1 On-boarding is Inconsistent or non-existent

2 Basic on-boarding exists but may not include thorough introduction or clear expectations

3 Basic on-boarding process exists with introduction and sharing of expectations, but lacks depth

4 On boarding process exists and includes a clear set of expectations for their involvement and In-depth Introduction to the organization; On-boarding is comprehensive and includes not only necessary information but also a cultural introduction to the organization (e.g., connection with "buddy")

Not Applicable

Do Not Know

Skip this section & answer later

Save progress & finish later

Back

Next

3.21

Firefox
McKinsey & Company Organizationa...
P Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
P Pandora
Podcasts
Z QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

ASPIRATIONS
4 of 4 questions answered
STRATEGY
13 of 13 questions answered
LEADERSHIP, STAFF AND VOLUNTEERS
21 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS
Are the composition, structure and operations appropriate for our organization?

Question 20
Do we support the development of Board members effectively?
1 Skill building for Board members is not considered or acted upon
2 Board members rarely engage in any skill building to improve their effectiveness
3 Board members engage in skill-building informally
4 Board members have ways to develop their skills through the Board structure
Not Applicable
Do Not Know

Question 21
Question 22
Question 23
Question 24
Question 25

Skip this section & answer later
Save progress & finish later
Back
Next

Firefox | McKinsey & Company Organizationa... | Pandora One - Listen to Pandora with... | +

https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | Screencast | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company | ORGANIZATIONAL CAPACITY ASSESSMENT TOOL | DEADLINE OCTOBER 31, 2013
-20 Days left | Logout

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
22 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the composition, structure and operations appropriate for our organization?

Question 20: Do we evaluate Board members effectively?

1 Board performance is **not evaluated**; No limit to length of service

2 Board performance **may be evaluated on an ad hoc basis** if significant challenges arise or if pushed by an outside group or funder; **Term limits may exist, but they may be frequently changed or waived**

3 Board performance is **formally evaluated regularly**; **Term limits are in place and adhered to**

4 **Feedback** on Board performance is **sought regularly** and board is **formally evaluated regularly (e.g., at least once every 3 years)**; Members serve for **defined and staggered** terms

Question 21

Question 22

Question 23: Not Applicable

Question 24

Question 25

Do Not Know

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts Z QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

23 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the composition, structure and operations appropriate for our organization?

Question 20

Is the Board's size and function aligned to organizational needs?

1

Board size and function are **misaligned to the current needs** of the organization (e.g., small group when fundraising is a primary aim and a large "working Board" engaging and actively supporting the work is needed)

2

Board size and function is **somewhat aligned** to the needs of the organization; **Many** members may be better suited for a different type of Board

3

Board size and function is **generally aligned** to the needs of the organization; Some members may be better suited for a different type of Board (e.g., because the Board's role has evolved since they joined)

4

Board size and function is **perfectly aligned** to the needs of the organization (e.g., small group willing to engage in actively supporting work in a newer organization; Large set of well-known and influential individuals with community connections and fundraising as primary aim)

Not Applicable

Do Not Know

Question 21

Question 22

Question 23

Question 24

Question 25

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

24 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Are the composition, structure and operations appropriate for our organization?

Question 20

Are Board meetings run effectively?

1 Meetings are **poorly organized** with **unclear agendas** and **lack of clear purpose**; **Lack of** Board structures to aid Board efficiency (e.g., subcommittees, consent agenda, meeting pre-reads)

2 Meetings **have clear agendas**, though **specific purpose of meeting may be vague**; Board structures and tools to aid efficiency are **rare**

3 Meetings **have clear agendas**, and the **specific purpose/decisions to be made are typically clear**; Meeting **pre-reads are usually available** in advance; For larger boards, **subcommittees exist** to advance the work, though effectiveness is inconsistent

4 Meetings **always have clear agendas**, and the **specific purpose/decisions to be made are well articulated**; Meeting **pre-reads are consistently available far enough in advance for members to engage**; For larger boards, **subcommittees exist** to advance the work and they are consistently effective

Not Applicable

Do Not Know

Question 21

Question 22

Question 23

Question 24

Question 25

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE

OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

25 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the Board provide appropriate oversight and leadership?

Question 26

Does the Board play a strong leadership role?

1

Provide **little direction**, support, and accountability to leadership; Board **not fully Informed** about material and other major organizational matters

2

Provide **occasional direction**, support and accountability to leadership; **Informed about all material matters in a timely manner** and Board responses and decisions are actively solicited

3

Provide **direction, support and accountability** to programmatic leadership; **Fully Informed of all major** matters and Board input and responses are actively sought and valued; **Full participant** in major decisions

4

Provide **strong direction, support, and accountability** to programmatic leadership and **engaged as a strategic resource**; **Open communication** between Board and leadership reflects mutual respect and appreciation for the Board's roles and responsibilities, shared commitment and valuing of collective wisdom; **Full participation** in major decisions

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

3.26

javascript:void(0);

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

LEADERSHIP, STAFF AND VOLUNTEERS
26 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?
How proactively do we manage talent?
How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS
Does the Board provide appropriate oversight and leadership?

Question 26
Does the Board provide effective organizational oversight?

1
Board **does not scrutinize** budgets or audits; Executive, treasury, and board **functions are unclear; Few or highly Informal** procedures in place

2
Roles of legal board, advisory board and management are **clear**; Board mostly **functions according to by-laws**; Board **reviews budgets, monitors potential conflicts** of interest, scrutinizes audits, and reviews IRS and state filings

3
Roles of legal board, advisory board, and managers are **clear and function well according to clear bylaws**; Board **reviews budgets, monitors potential conflicts** of interest, scrutinizes audits, and reviews IRS and state filings

4
Legal board, advisory board and managers **work well together** from clear roles; **Board fully understands and fulfills fiduciary duties**; **Acts as a generative force and steward of organization of the future**

☐ Not Applicable
☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

3.27

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

LEADERSHIP, STAFF AND VOLUNTEERS
27 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?
How proactively do we manage talent?
How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Does the Board provide appropriate oversight and leadership?

Question 26
Does the Board effectively oversee the CEO?

1
Does not set performance targets or hold CEO/ED accountable or does not operate according to formal procedures, or Board micromanages CEO, reducing benefit of his/her expertise

2
Occasionally sets organizational direction and targets, but does not regularly review CEO/ED performance

3
Board co-defines performance targets and actively encourages CEO/ED to meet targets; Annual review of CEO's performance, but board not prepared to hire or fire CEO

4
Board actively defines performance targets and holds CEO/ED fully accountable; Board empowered and prepared to hire or fire CEO/ED if necessary; Board helps CEO with establishing goals and acts as a support team for CEO

☐ Not Applicable
☒ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later
Save progress & finish later
Back
Next

3.28

javascript:void(0);

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

LEADERSHIP, STAFF AND VOLUNTEERS
28 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?
How proactively do we manage talent?
How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS
Do we have the right people with the right skills?

Question 29
Is our staff diverse in its range of skills needed for given role e.g., analytic skills, relationships) and backgrounds?

Question 30
1 Staff drawn from a narrow range of backgrounds and experiences
2 Some diversity of staff backgrounds and experiences

Question 31
3 Staff drawn from diverse backgrounds and experiences; Bring a broad range of skills
4 Staff drawn from **extraordinarily diverse backgrounds and experiences**; Bring broad range of skills that are complementary to each other

Question 32
Not Applicable
Do Not Know

Want to leave a comment?
Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later
Save progress & finish later
Back
Next

3.29

Firefox | McKinsey & Company Organizationa... | Pandora One - Listen to Pandora with... | +

https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | Screencast | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL **DEADLINE OCTOBER 31, 2013** **-20 Days left** Logout

LEADERSHIP, STAFF AND VOLUNTEERS 29 of 43 questions answered

NAVIGATION

- Does the leadership team have the skills to be effective?
- Do the CEO and leadership team have the experience to be effective?
- How effective are the CEO/ED and leadership team?
- Does the leadership team deliver impact?
- Is there a healthy working relationship amongst the senior leadership team?
- Are the right people on the Board with the right level of engagement?
- Are the composition, structure and operations appropriate for our organization?
- Does the Board provide appropriate oversight and leadership?
- Do we have the right people with the right skills?
- How well do we bring in talent?
- How proactively do we manage talent?
- How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS

Do we have the right people with the right skills?

Question 29 Do we have high quality staff to drive the organization forward?

Question 30

Question 31

Question 32

1 Interest and abilities limited to present job; Little ability to solve problems as they arise

2 Good capabilities, including some ability to solve problems as they arise ; Many interested in work beyond their current jobs and in the success of the organization's mission

3 Most are **highly capable and committed** to mission and strategy; Eager to learn and develop, and assume increased responsibility

4 Most staff are **highly capable in multiple roles, committed both** to mission and strategy, as well as continuous learning; Most are eager and able to take on special projects and collaborate across divisional lines; Staff are frequent source of ideas and momentum for improvement and innovation

☐ Not Applicable ☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later ? Save progress & finish later Back Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

30 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS

Do we have the right people with the right skills?

Question 29

Question 30

Question 31

Question 32

Does our staff represent the organization?

1

Staff may occasionally create a **negative impression of the organization** through inappropriate behavior or **lack of knowledge** on the organization's core topics, thereby undermining credibility

2

Most staff present a **positive external impression** with others; Most staff have a **reasonable depth of individual knowledge** on topics core to the organization

3

All staff consistently present a **positive external impression** with others; Most staff have a **reasonable depth of individual knowledge** on topics core to the organization

4

Others in the field view the organization's staff as **exemplars of an effective organization** (e.g., critical thinkers, values-driven, performance-minded, considerate of others) who are **thoughtful and deeply knowledgeable** on topics core to the organization

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

3.31

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

31 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

Do we have the right people with the right skills?

Question 29

Question 30

Question 31

Question 32

Do we have high quality volunteers?

1 Limited abilities; May be unreliable or have low commitment; Volunteers are poorly managed

2 Sufficiently capable; Mostly reliable, loyal, and committed to organization's success; Volunteers managed but without standards and little accountability

3 Very capable set of individuals bringing required skills to the organization; Reliable, loyal and highly committed to organization's success and to "making things happen"; Contribute to the organization's overall success, but do not generally play core roles without substantial staff supervision; Volunteers are managed and many have long-term involvement in the organization

4 Extremely capable set of individuals who bring complementary skills to organization; Reliable, loyal and highly committed to organization's success and "making things happen"; Many contribute to the organization's overall success and some can play core roles without special supervision; Volunteers managed very well and most have sustained involvement in organization

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

LEADERSHIP, STAFF AND VOLUNTEERS
32 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?
How proactively do we manage talent?
How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS
How well do we bring in talent?

Question 33
Do we hire the right people in the right way in the appropriate timeframe?

Question 34

1
Hires often based on general traits with **minimal consideration** for skills/experiences needed for specific role; **Limited clarity on hiring parameters** (e.g. salary, benefit, and other parameters); **Many** positions are **unfilled or inadequately filled**

2
Can **articulate** required skills/ experiences for roles, but may be vague or **Inconsistently adhered to**; **General clarity** in hiring parameters are in place; **Most critical** positions are **staffed**

3
Require specific skills/ experience for given roles and hires **align** with requirements; **Clarity** on hiring parameters **Including at least** contract templates and salary band clarity for effective offers and negotiations; **Almost all** positions are **staffed**

4
Can **clearly articulate** skills/ experience required for given positions and hires **almost always meet requirements**; **Clear parameters** for hiring are **available to all with hiring responsibilities**; Positions within and peripheral to organization are **fully staffed** (no long-standing vacancies)

☐ Not Applicable
☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later
Save progress & finish later
Back
Next

3.33

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

33 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS

How well do we bring in talent?

Question 33

Question 34

Do we bring people on board thoughtfully and effectively?

1

Nonexistent or Inconsistent

onboarding process; **Staff are not prepared** in the specific skills and tools that support success in the organization; **No** baseline information on the organization and the core issues it is striving to address is provided to new hires

2

Rudimentary

processes to onboard staff; New staff **usually have appropriate space and resources within weeks**; Staff trained in some activities specific to their individual jobs; **Some Information** on the organization and the core issues it is striving to address is provided, though gaps exist

3

Some well-planned

processes to onboard staff, but pieces missing; **Almost always** set up new staff with appropriate space and resources **within a week**; Train staff in range of organizational activities and individual job responsibilities; **Baseline of Information** on the organization and the core issues it is striving to address is provided

4

Well-planned

processes to onboard staff; New staff **always have** appropriate space and resources; Train staff in range of organizational activities and individual job responsibilities within days; **comprehensive baseline of Information** on the organization and the core issues it is striving to address is provided

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox | McKinsey & Company Organizationa... | Pandora One - Listen to Pandora with... | +

https://ocat.mckinseysociety.com/take-survey/263

Admin Guide | Basecamp | Bing | Eventbrite | Issues SS | OWA | Pandora | Podcasts | QB | RT | Sched1 | Screencast | SF | SM | Timezones | Website | WP | Zamzar - audio file conv

McKinsey&Company | ORGANIZATIONAL CAPACITY ASSESSMENT TOOL | DEADLINE **OCTOBER 31, 2013** -20 Days left | Logout

LEADERSHIP, STAFF AND VOLUNTEERS 34 of 43 questions answered

NAVIGATION

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS

How proactively do we manage talent?

Question 35 Do we have and maintain a pipeline of talent?

1 Few Internal resources dedicated to or processes planned for recruiting; **No processes** in place to identify new managerial talent

2 Some Internal processes to recruit key staff, including dedicated staff or resources and streamlined interview practices; **Some formal recruiting processes** in place

3 Well-planned processes to recruit key staff and leadership, including **at least some of the following:** dedicated staff or resources, strong job descriptions, broad networks to circulate job opportunities, codified interview practices, strong connections to potential sources of new talent

4 Well-planned, evolving processes to recruit staff and leadership, including **most of the following:** dedicated staff or resources, strong job descriptions, broad networks to circulate job opportunities, codified and streamlined interview practices, internal culture and processes that prioritize recruiting

Not Applicable **Do Not Know**

Question 36

Question 37

Question 38

Question 39

Question 40

Skip this section & answer later ? Save progress & finish later Back Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

35 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongstst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How proactively do we manage talent?

Question 35

Question 36

Question 37

Question 38

Question 39

Question 40

Do we develop and retain our staff?

1 Standard career paths in place; Very limited or no training, coaching, and feedback opportunities; No regular performance appraisals for staff

2 Development plans exist for senior staff and top performers; Performance reviews are Infrequent and are not well linked to development plans

3 Development and retention of key staff is high-priority on CEO/ED's agenda; Tallored development plans for senior staff and top performers; Some training, coaching, and feedback opportunities available for all staff; Performance reviews are regular and linked to development plans for all staff

4 Well-planned process to develop and retain key managers and other staff; CEO/ED takes active Interest in managerial development; Individually tallored development plans for most within the organization; Relevant and regular internal and external training, job rotation, coaching, and feedback; Regular performance reviews are Institutionalized

Not Applicable

Do Not Know

Skip this section & answer later

Save progress & finish later

Back

Next

3.36

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE **OCTOBER 31, 2013**
-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

36 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How proactively do we manage talent?

Question 35

Do we have incentive systems that help us retain and develop talent?

1

No incentive system in place, or incentive system is **Ineffective** and/or generates bad will

2

Some basic elements of incentive system in place; May include **one of**: competitive salary (possibly partly performance-based), attractive career development options, or opportunities for leadership and entrepreneurship; **Some evidence** of motivational effect on staff performance

3

Many elements of incentive system in place; Includes a **few of**: competitive salary (partly performance-based), attractive career development options, opportunities for leadership and entrepreneurship; **Obvious effect** in motivating staff to over deliver

4

Well-designed, clear, and well-accepted incentive system; **Includes all of**: competitive salary (partly performance-based), attractive career development options, opportunities for leadership and entrepreneurship; **System effective** in motivating staff to over deliver in their job

Not Applicable

Do Not Know

Question 36

Question 37

Question 38

Question 39

Question 40

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...
 https://ocat.mckinseysociety.com/take-survey/263
 Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Schedl Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company ORGANIZATIONAL CAPACITY ASSESSMENT TOOL DEADLINE **OCTOBER 31, 2013**
 -20 Days left Logout

LEADERSHIP, STAFF AND VOLUNTEERS
 37 of 43 questions answered

NAVIGATION

- Does the leadership team have the skills to be effective?
- Do the CEO and leadership team have the experience to be effective?
- How effective are the CEO/ED and leadership team?
- Does the leadership team deliver impact?
- Is there a healthy working relationship amongst the senior leadership team?
- Are the right people on the Board with the right level of engagement?
- Are the composition, structure and operations appropriate for our organization?
- Does the Board provide appropriate oversight and leadership?
- Do we have the right people with the right skills?
- How well do we bring in talent?
- How proactively do we manage talent?
- How effectively do we recruit, use and retain the volunteers in our organization?

LEADERSHIP, STAFF AND VOLUNTEERS
 How proactively do we manage talent?

Question 35 Do we have leadership and management succession plans in place?

1 No pipeline of leadership identified; Organization would experience significant setbacks should leadership change be needed

2 Leadership team **Identifies** high potential talent, but individuals are not mentored or developed proactively

3 High-potential talent **Identified in ad hoc, but proactive** fashion; Individuals are **Informally mentored**

4 **Processes** in place to proactively identify high-potential talent; Individuals are formally and informally mentored to build skills **and** credibility towards leadership or management role

Question 36

Question 37

Question 38 Not Applicable Do Not Know

Question 39

Question 40

Skip this section & answer later ? Save progress & finish later Back Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

https://ocat.mckinseysociety.com/take-survey/263

some random bar seattle

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

38 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How proactively do we manage talent?

Question 35

Do we have an integrated plan and process to manage talent?

1

Uncovers and/or addresses Talent Management needs **only when too large to ignore**; **Lack** planning activities and access to expertise; **No experience** in integrated Talent Management planning; Culture of talent development absent throughout the organization

2

Some ability and tendency to develop **high-level** plan; Have access to **standard resources** for Talent Management expertise; Plan **loosely or not** linked to strategic planning and **roughly** guides organization; Minimum culture of talent development throughout the organization

3

Develops and regularly refine **concrete, realistic and integrated** plan using internal or external Talent Management expertise **as needed**; **Linked** to strategic planning and **used** by organization; Moderate culture of talent development throughout the organization

4

Develops and regularly refines **concrete, realistic, detailed**, integrated plan using **sustainable, highly qualified** internal or external Talent Management resources; **Tightly linked** to strategic planning and **systematically used** by organization, strong culture of talent development throughout the organization

Question 39

Not Applicable

Do Not Know

Question 36

Question 37

Question 38

Question 39

Question 40

Skip this section & answer later

Save progress & finish later

Back

Next

3.39

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

Admin Guide

Basecamp

Bing

Eventbrite

Issues SS

OWA

Pandora

Podcasts

Z QB

RT

Sched1

Screencast

SF

SM

Timezones

Website

WP

Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

39 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How proactively do we manage talent?

Question 35

Are our people (organization's leadership and staff) satisfied and motivated in their work?

1

Staff **often** feel underappreciated; Employees **only** do what is required; Turnover is generally high across the organization

2

Staff are **moderately satisfied** with the activities that they are involved in and **may** commit to extra responsibilities **during especially critical times**; in cases where dissatisfaction exists, a plan is in place to make necessary improvements

3

Staff are **generally satisfied** and will **often go above and beyond** in areas of particular interest to them; Staff **enjoy their day to day work** and turnover is relatively low

4

Staff are **consistently willing to go above and beyond** what is expected; Employees are **excited about their day-to-day work**; turnover is low and staff speak enthusiastically with others about the organization and their role; A **regular process** for gathering, reviewing, and acting on employee satisfaction is in place

Not Applicable

Do Not Know

Question 36

Question 37

Question 38

Question 39

Question 40

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox
McKinsey & Company Organizationa...
Pandora One - Listen to Pandora with...
+
https://ocat.mckinseysociety.com/take-survey/263
some random bar seattle
Admin Guide
Basecamp
Bing
Eventbrite
Issues SS
OWA
Pandora
Podcasts
QB
RT
Sched1
Screencast
SF
SM
Timezones
Website
WP
Zamzar - audio file conv

McKinsey&Company
ORGANIZATIONAL CAPACITY ASSESSMENT TOOL
DEADLINE OCTOBER 31, 2013
-20 Days left
Logout

LEADERSHIP, STAFF AND VOLUNTEERS
40 of 43 questions answered

Does the leadership team have the skills to be effective?
Do the CEO and leadership team have the experience to be effective?
How effective are the CEO/ED and leadership team?
Does the leadership team deliver impact?
Is there a healthy working relationship amongst the senior leadership team?
Are the right people on the Board with the right level of engagement?
Are the composition, structure and operations appropriate for our organization?
Does the Board provide appropriate oversight and leadership?
Do we have the right people with the right skills?
How well do we bring in talent?
How proactively do we manage talent?
How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How effectively do we recruit, use and retain the volunteers in our organization?

Question 41

Do we have the right systems in place to recruit and retain volunteers?

Question 42

1
No systematic approach to recruitment of volunteers; Insufficient efforts in place to encourage volunteers to remain with the organization

Question 43

2
Basic approach to recruitment of volunteers from a **limited set** of sources; **Sufficient information** on the recruitment process and the organization available to potential volunteers; some training and other opportunities in place to build a connection to the mission and thus encourage retention

3

Well-planned recruitment process for volunteers **including targeting sources with likely skills and qualifications**; **Sufficient information** on the recruitment process and organization available to potential volunteers; **Multiple dimensions** (e.g., training, personal growth, range of responsibilities) in place to build a connection to the mission and thus encourage retention

4

Well-planned recruitment processes that adjust as needs for capacity and skills change; **Sufficient information** on the recruitment process and organization available to potential volunteers; **Comprehensive on-boarding approach** in place to support the integration of the volunteer into the organization; **Multiple dimensions** in place to build a connection to the mission and thus encourage retention

☐ Not Applicable
☐ Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Schedl Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

41 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

Question 41

Question 42

Question 43

LEADERSHIP, STAFF AND VOLUNTEERS

How effectively do we recruit, use and retain the volunteers in our organization?

Question 41

Do our volunteers have the right skills required for success in our organizations?

1

Volunteers have a **limited or narrow range of abilities** relative to the organization's needs; Often **unreliable or have low commitment** so cannot be counted on to support critical tasks

2

Volunteers have **some skills beneficial to the organization**; **commitment levels are inconsistent** so only a core group can be counted on to support critical tasks; **Some volunteers** have a **personal connection and passion** for the mission

3

Volunteers bring a **diverse set of necessary skills** to the organization; Are **reliable, loyal and highly** committed to organization's success and to "making things happen"; **Contribute** to the organization's overall success, but do not generally play core roles without substantial staff supervision; are **actively managed** and **many** have **long-term involvement** in the organization

4

Volunteers bring **invaluable complementary skills** to organization; Are **reliable, loyal and highly** committed to organization's success and "making things happen"; **Many contribute** to the organization's overall success and **some** can **play core roles without special supervision**; are actively well-managed and **most** have **sustained involvement** in organization

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

3.42

Firefox

McKinsey & Company Organizationa... Pandora One - Listen to Pandora with...

<https://ocat.mckinseysociety.com/take-survey/263>

some random bar seattle

Admin Guide Basecamp Bing Eventbrite Issues SS OWA Pandora Podcasts QB RT Sched1 Screencast SF SM Timezones Website WP Zamzar - audio file conv

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-20 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

42 of 43 questions answered

Does the leadership team have the skills to be effective?

Do the CEO and leadership team have the experience to be effective?

How effective are the CEO/ED and leadership team?

Does the leadership team deliver impact?

Is there a healthy working relationship amongst the senior leadership team?

Are the right people on the Board with the right level of engagement?

Are the composition, structure and operations appropriate for our organization?

Does the Board provide appropriate oversight and leadership?

Do we have the right people with the right skills?

How well do we bring in talent?

How proactively do we manage talent?

How effectively do we recruit, use and retain the volunteers in our organization?

NAVIGATION

LEADERSHIP, STAFF AND VOLUNTEERS

How effectively do we recruit, use and retain the volunteers in our organization?

Question 41

Are volunteers well matched to the needs of the organization and are they involved in meaningful mission-related activities?

Question 42

Question 43

1

Volunteers **dictate their involvement**, irrespective of the needs of the organization; **Certain areas are over-staffed while others remain understaffed**; Activities carried out by volunteers are **disconnected from the overall vision** of the organization

☐

2

Volunteers are **somewhat aligned to the needs** of the organization though **several areas remain underserved**; Activities carried out by volunteers are **sometimes linked** to the overall mission of the organization

☐

3

Volunteers are **typically matched** to the area of the organization where their **help and skills are most needed**; Activities carried out by volunteers are **mostly linked** to the overall mission of the organization

☒

4

Volunteers are **systematically matched** to the area of the organization where they are **needed most**, and **receive training and coaching** enabling them to be more effective; Volunteers are heavily involved in activities **directly linked** to the organization's mission

☐

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

3.43

javascript:void(0);

Firefox

[Session Materials - CFC 2013 Confere...](#)
[SVP Boulder County » Blog](#)
[McKinsey & Company Organizationa...](#)

[https://ocat.mckinseysociety.com/take-survey/263](#)

forklift danceworks

[Admin Guide](#)
[Analytics](#)
[Basecamp](#)
[Bing](#)
[Eventbrite](#)
[Issues SS](#)
[join.me](#)
[OWA](#)
[Pandora](#)
[Podcasts](#)
[Z QB](#)
[RT](#)
[Sched1](#)
[Screencast](#)
[SF](#)
[SM](#)
[Timezones](#)
[WP](#)
[Website](#)

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE **OCTOBER 31, 2013**
-133 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

43 of 43 questions answered

FUNDING

0 of 11 questions answered

Do we have a sustainable funding model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to develop and revise our financial plan and budget?

VALUES

0 of 7 questions answered

LEARNING AND INNOVATION

0 of 15 questions answered

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 11 questions answered

NAVIGATION

FUNDING

Do we have a sustainable funding model that enables growth?

Question 1

Do we have the right people and skills to fundraise effectively?

1

Generally **weak** fundraising skills and **lack of expertise** (either internal expertise or access to external expertise)

☐

2

Basic fundraising skills and expertise, though **some** sources of funding are **out of reach** due to lack of skills or expertise; Able to **sporadically access** external fundraising expertise to augment internal capabilities

☐

3

Well-developed internal fundraising skills (e.g. donor management, grant writing, special events, getting major gifts, accessing fundraising circles, **or** online fundraising); **Regularly access** external fundraising expertise to build internal capabilities

☒

4

Highly-developed internal fundraising skills (e.g. donor management, grant writing, special events, getting major gifts, accessing fundraising circles, **and** online fundraising) **and** expertise in all funding source types to cover all regular needs; **Access to external expertise** for extraordinary needs; **Other nonprofits look to the** organization's fundraising activities and strategies for inspiration

☐

5

Not Applicable

☐

Do Not Know

☐

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

Back

Next

4.1

4.2

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE: OCTOBER 31, 2013
-133 Days left

Logout

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
1 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we have a sustainable funding model that enables growth?

Question 1

Do we have the right systems to fundraise effectively?

1

Donor management systems are **rudimentary and lacking key information**, or significant information is out-of-date; Fundraising goals are **rarely set** and progress is tracked **infrequently** or not at all; Organization is **often unaware** of new grant opportunities available

2

Donor management systems are **mostly accurate, and sporadically updated**; Fundraising is driven by an **overall** target with progress updates; Organization is **typically** aware of new grant opportunities that become available, though opportunities are sometimes missed

3

Donor management systems are **accurate, and often updated**; Fundraising is driven by **specific** targets and **tracked** to allow for mid-course adjustments and to motivate action; Organization is **always aware** of new grant opportunities that become available

4

Donor management systems are **easily accessible, accurate, and frequently updated**; Fundraising is driven by **clear segmented** targets and **tracked at a detailed level** to evaluate effectiveness of approaches used, allow for mid-course adjustments, and motivate action; Organization is **always aware** of new grant opportunities that become available

Not Applicable

Do Not Know

Question 2

Question 3

Question 4

Question 5

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

Back

Next

ASPIRATIONS

4 of 4 questions answered



STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

2 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES

0 of 7 questions answered

LEARNING AND
INNOVATION

0 of 15 questions answered

MARKETING AND
COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

NAVIGATION

FUNDING

Do we have a sustainable funding model that enables growth?

Question
1

Do we have funding sources that fit our organization's needs?

1

☐ Funding source missions are **not aligned with the organization's mission**; attempts to match funder requirements causes organization to move away from established theory of change

2

☐ Some funding source missions are **aligned with the organization's mission**; Attempts to match funder requirements sometimes causes organization to move away from established theory of change

Question
2Question
3

3

☐ Target funding sources have missions that are aligned with the organization; Attempts to match funder requirements rarely causes organization to move away from established theory of change; creative sources (e.g., pro-bono services, in-kind donations) are sometimes utilized

4

☐ Organization has well planned systems in place for seeking funding sources ; all funding source missions are aligned with the organization's mission and theory of change; creative sources are fully explored and utilized

Question
4Question
5☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
3 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES

NAVIGATION

FUNDING

Do we have a sustainable funding model that enables growth?

Question
1

Is our funding base sustainable?

1

Funding base is **not reliable** and has little time commitment to the organization; There is **no system** in place to hedge against potential market instability; Funding base cannot support expanded growth

2

Funding base has some **short-term** commitment to the firm; Organization is **planning** to engage in activities to hedge against market instabilities

Question
2Question
3

3

Funding base is **somewhat reliable**, and has a **medium-term** commitment to the organization; **Some early-stage activities** to hedge against market instabilities (e.g., endowment, sustainable revenue generating activity) are in place; Funding base **can likely** support expanded growth through networks or ability to increase funding

4

Highly reliable funding with long term commitment to the organization; Organization is **insulated** from potential market instabilities; Funding base **has and can continue to** support expanded growth through networks or ability to increase funding

Question
4Question
5

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
4 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we have a sustainable funding model that enables growth?

Question
1

How effective is our revenue generation model?

1

No internal revenue generation activities;
Concepts such as cause related marketing,
fee-for-service models and retailing are
neither explored nor pursued

2

Some internal revenue generation activities;
however, financial net contribution is
marginal; Or revenue-generation activities
distract from programmatic work and often
distract senior management team

Question
2Question
3

3

Some **proven** internal revenue generation
activities and skills provide **substantial**
additional funds for program delivery, but
partially distract from programmatic work
and require significant senior management
attention

4

Significant **proven** internal revenue
generation activities and skills provide
substantial additional funds for program
delivery; Revenue-generating activities are
synergistic with and do not distract from
focus on creating social impact

Question
4

Not Applicable

Do Not Know

Question
5

Want to leave a comment?

Skip this section & answer later








?

Save progress & finish later

←

Back

Next →

- ▼ ASPIRATIONS
4 of 4 questions answered 
- ▼ STRATEGY
13 of 13 questions answered 
- ▼ LEADERSHIP, STAFF AND VOLUNTEERS
43 of 43 questions answered 
- ▲ FUNDING
5 of 11 questions answered 
 - Do we have a sustainable funding model that enables growth? 
 - Do we manage our budget effectively? 
 - Do we have an effective process to develop and revise our financial plan and budget? 
- ▼ VALUES
0 of 7 questions answered
- ▼ LEARNING AND INNOVATION
0 of 15 questions answered
- ▼ MARKETING AND COMMUNICATION
0 of 6 questions answered
- ▼ ADVOCACY
0 of 44 questions answered
- ▼ MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we manage our budget effectively?

Question
6

Do we have the technical systems and skills in place to manage our finances?

Question
7Question
8

1

Financial systems **have significant gaps** in any of the following: financial controls, accounting procedures, or cash flow tracking; Financial staff **inexperienced or without requisite skills**; Expense systems are **informal and may be open to abuse**

2

Basic financial controls in place; Standard accounting method that is **consistent and relevant, usable** chart of accounts that **generally meets** organizational needs; **High-level** cash flow tracking; **Somewhat experienced** accounting and/or financial management staff overseeing financial operations; **Clear and usable** systems for expense reporting to **ensure** accountability and cost efficiency

3

Defined and executed financial controls; Standard accounting method that is **consistent and relevant, usable** chart of accounts relevant to organizational needs; **High-level** cash flow tracking; **Somewhat experienced** accounting and/or financial management staff overseeing financial operations; **Clear and usable** systems for expense reporting to **ensure** accountability and cost efficiency

4

Well-defined and executed financial controls; Standard accounting method that is **consistent and relevant, usable** chart of accounts relevant to organizational needs; Detailed cash flow tracking; **Experienced** accounting and/or financial management staff overseeing financial operations; **Clear and usable** systems for expense reporting to **ensure** accountability and cost efficiency; **Training available** and given to staff with budgetary responsibility

☐

Not Applicable

☐

Do Not Know

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered

FUNDING

6 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES

0 of 7 questions answered

LEARNING AND
INNOVATION

0 of 15 questions answered

MARKETING AND
COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 45 questions answered

NAVIGATION

FUNDING

Do we manage our budget effectively?

Question
6

Are we able to manage our finances?

1

Managerial accounting systems lack insight into cost centers; Overly cumbersome and slow-moving accounts payable and receivable processes, finance team struggles to determine current financial situation

2

Managerial accounting systems used to understand cost centers; Cash flow actively managed; Accounts payable and receivable processed in a timely manner; Finance team can determine current financial situation

Question
7Question
8

3

Managerial accounting systems used to understand cost centers; Cash flow actively managed; **Accounts payable and receivable processed in a timely and efficient manner**; Finance team can **easily determine current financial situation**; **Central purchasing strategies** are in place on a **few** items

4

Managerial accounting systems used **allow analysis of and insight** into cost centers; Cash flow actively managed; **Accounts payable and receivable processed in a timely and efficient manner**; Finance team can **easily determine current financial situation**, as well as **project future scenarios**; **Central purchasing strategies** are in place to enable group purchasing opportunities for most large purchases and **govern purchasing decisions** of organization broadly

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
7 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we manage our budget effectively?

Question
6

Are we able to make sound and informed financial decisions?

Question
7

1

Budgets set annually and rarely adjusted or adjusted in a way that does not reflect actual implications; Ineffective processes and systems, with infrequent review by senior management

2

Quarterly information and analysis on financial position is **reviewed, though may not be linked** with budgeting, decision making, and organizational objectives and strategic goals; **Somewhat effective processes and systems**, including regular review by senior management

Question
8

3

Reasonably current information and analysis on financial position is **integrated** with budgeting, decision making, and organizational objectives and strategic goals; **Effective processes and systems**, including frequent review by senior management

4

Up-to-date information and analysis on financial position is **integrated** with budgeting, decision making, and organizational objectives and strategic goals; **Effective processes and systems**, including frequent review by senior management

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
8 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan and
budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we have an effective process to develop and revise our financial plan and budget?

Question
9

Do we have a formal process for financial planning and budgeting?

1

Very limited or no financial planning; One central budget developed for the entire organization with no breakdown of divisional budgets

2

Limited financial planning updated in ad-hoc fashion; Used to **guide or assess** financial activities but not organizational needs; **Some attempt** to isolate divisional (program or geographical) budgets within central budget

Question
10

Question
11

3

Solid financial plans updated regularly; **Generally** reflects organizational needs; **Solid efforts made** to isolate divisional (program or geographical) budgets within central budget

4

Very solid financial plans updated continuously; Developed from a process that incorporates and reflects organizational needs and objectives, and is used as a strategic tool; **Well-understood** divisional (program or geographical) budgets within overall central budget

Not Applicable

Do Not Know

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
9 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan
and budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we have an effective process to develop and revise our financial plan and budget?

Question
9

Do we use our financial plan to guide our operational decisions?

1 Financial plan/budget, if it exists, is little more than a **static** document; Performance against budget **loosely** or **not** monitored by relevant staff (e.g., program heads, C suite staff, financial officer)

2 Financial plan/budget utilized as **operational tool**; Performance-to budget monitored **sporadically by relevant staff**

Question
10

3 Financial plan/budget **integrated** into operations; performance-to budget monitored **regularly by relevant staff**

4 Financial plan/budget **integrated** into full operations; Performance-to-budget **closely and regularly** monitored by relevant staff

Question
11

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



4.10

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
10 of 11 questions answered

Do we have a sustainable funding
model that enables growth?

Do we manage our budget effectively?

Do we have an effective process to
develop and revise our financial plan
and budget?

VALUES
0 of 7 questions answered

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

NAVIGATION

FUNDING

Do we have an effective process to develop and revise our financial plan and budget?

Question
9

Are we able to manage our finances to take advantage of opportunities for impact, while staying within budget?

Question
10

1
☐ Organization **rigidly adheres to budget** and is **unable to adjust as conditions and results evolve**; **Frequently miss goals or opportunities for greater impact** due to barriers to adjusting spending (e.g., slow internal approval processes); When flexibility is granted it **may conflict with constraints** placed on funding sources (e.g., required use of federal grant funding). Few institutional tools available to create flexible.

2
☐ Organization is **able to make adjustments to budget as conditions and results evolve**, while staying within constraints on funding sources; **Sometimes miss goals or opportunities for greater impact** due to barriers to adjusting spending (e.g., slow internal approval processes). Sporadic use of tools to create flexibility.

Question
11

3
☐ Organization is **able to make adjustments to budget as conditions and results evolve**, while staying within constraints on funding sources; **Rarely miss goals or opportunities for greater impact** due to barriers to adjusting spending (e.g., slow internal approval processes). Has established and sometimes adopts a set of tools to create flexibility (e.g., lines of credit, bridge loans, reserves)

4
☐ Organization can **rapidly adjust spending** to better deliver impact; **staff at multiple levels are sufficiently empowered** to make spending decisions; **Adjustments consistent with funding constraints**; **Funding constraints proactively managed** to allow flexibility; **very rarely miss goals or opportunities for greater impact**. Has established and frequently uses a set of tools to create flexibility (e.g., lines of credit, bridge loans, reserves)

☐ Not Applicable

☐ Do Not Know

Skip this section & answer later



Save progress & finish later

← Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
0 of 7 questions answered

Do our culture and values help us operate
effectively towards fulfilling our mission
and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards
fulfilling our mission and vision?

Question
1

Do we share our beliefs and values?

1

No common set of basic beliefs and values (e.g., social, religious) within the organization and **almost no processes** (i.e. aligning candidates with shared beliefs included in selection process, holding team retreats to process and share values, etc.) in place to build them

2

Common set of basic beliefs exists in **some groups** within the organization but not shared broadly; Values may only be **partially aligned** with organizational purpose or **rarely harnessed** to produce impact; **Only few** processes in place to build them

Question
2

Question
3

Question
4

Question
5

Question
6

3

Common set of basic beliefs held by **many people** within the organization that provide team with a **sense of identity**; Beliefs are **aligned with organizational purpose** and **occasionally harnessed** to produce impact; Processes to **build and maintain** shared values in place

4

Common set of basic beliefs and values exists and is **widely shared** within the organization, providing members with **strong identity and guiding their behavior**; Beliefs remain **consistent and stable across leadership changes**; Beliefs **clearly support overall purpose** of the organization and are **consistently harnessed** to produce impact, with **multiple processes in place** to maintain them

☐

Not Applicable

☐

Do Not Know

Skip this section & answer later



Save progress & finish later

← Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
3 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards
fulfilling our mission and vision?

Question
1

Do we hold each other accountable for day-to-day progress that
builds success?

Question
2

1 Individuals within the organization **do not know what is expected** of them, are **not sufficiently empowered** to make decisions, and **rarely are there rewards or consequences** for progress or lack thereof

2 Individuals within the organization generally know what is expected of them, and in most cases are empowered to make decisions; Rewards and consequences applied only in extreme cases

Question
3

3 Individuals know what is expected from them; Individuals empowered with sufficient decision-making ability to shape their work towards expectations; Rewards or consequences are clearly understood and consistently applied

4 Individuals at all levels of the organization know exactly what is expected from them and how performance will be assessed; Individuals empowered with sufficient decision-making ability to shape their work towards expectations; Rewards or consequences are clearly understood and consistently applied

Question
4

Question
5

Not Applicable

Do Not Know

Question
6

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS

4 of 4 questions answered



STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

11 of 11 questions answered



VALUES

2 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?LEARNING AND
INNOVATION

0 of 15 questions answered

MARKETING AND
COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY

0 of 15 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards
fulfilling our mission and vision?Question
1

Do individuals have an results orientation across the organization?

1

Organization has **vague or low** expectations for performance; Employees are **hired, rewarded and promoted for executing** a set of tasks rather than for impact; Decision-making not driven by expected outcomes

2

Organization has **clear expectations** for performance; **Hiring considers** previous performance; Rewards and promotions include - but are **not primarily driven by** - performance; Day-to-day **processes and decision-making sometimes** reference outcomes

Question
2Question
3Question
4Question
5Question
6

3

Organization has **high expectations** for performance; **Key employees** are systematically hired, rewarded and promoted for their collective contribution; Day-to-day **processes and decision-making frequently** reference outcomes

4

Organization has **high expectations** for performance; **All employees** are systematically hired, rewarded and promoted for their collective contribution; Day-to-day processes and decision-making **constantly** reference outcomes

☐

Not Applicable

☐

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
3 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards fulfilling our mission and vision?

Question
1

Do we have a learning culture?

1

Individuals **rarely challenge current approaches** and **may be discouraged** from doing so; **Adjustment** of solutions, even in the face of compelling data or need, **is often resisted**; Experimentation is not supported; **Learnings** from experiments that are undertaken are **not captured**

2

Individuals **sometimes challenge current approaches** and **are not discouraged** from doing so; **Adjustment** of solutions **may** occur if supported by overwhelming evidence; Experimentation **sometimes supported**; **learnings** from experiments **may not be captured**

Question
2

Question
3

Question
4

Question
5

Question
6

3

Individuals **often challenge current approaches and are encouraged to do so**; **Potential adjustments** of solutions are **welcomed**; Organization **supports experimentation and learning**; not punitive if tests do not yield desired results

4

Individuals **are expected to challenge** current approaches and **are supported** in doing so; Individuals have a **genuine willingness and excitement to adapt solutions** when needed; Organization **actively encourages and provides resources to drive experimentation and learning**; Organization creates for all staff space and time for learning (e.g., sabbaticals, designated hours)

Not Applicable

Do Not Know

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
4 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards fulfilling our mission and vision?

Question
1

Do we focus on serving others?

1

Interests of external constituents/beneficiaries is striving to benefit are **rarely referenced** in conversation; **Internal or personal interests** are **prioritized ahead** of those of constituents/ beneficiaries;

2

Interests of external constituents/beneficiaries **are raised in conversations and factored** into some decisions and are **considered with internal interests** or politics at all levels of the organization

Question
2

Question
3

3

Interests of external constituents/beneficiaries **are often referenced** in organization's conversations, **are critical in significant decisions at a senior level**, and are **typically seen as more important** than internal interests or politics – especially amongst the senior team

4

Interests of external constituents/beneficiaries **are ever-present** in organization's conversations, **drive decisions throughout the organization** and are **unquestioningly more important** than internal interests or politics at all levels of the organization

Question
4

Question
5

5

Not Applicable

6

Do Not Know

Question
6

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
5 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards fulfilling our mission and vision?

Question
1

Do we have strong organizational norms (e.g, shared operating principles across organization) ?

Question
2

☐ 1 No common principles exist to address new or ambiguous situations; Organization primarily managed by adherence to process/rules

☐ 2 Informal operating principles exist (e.g., transparency, trust, respecting opinions, having fun, putting beneficiaries interests first), but are **not explicitly articulated** and **may vary** between members or parts of the organization; Principles **sometimes serve as guideposts for decision-making** at higher levels of the organization

Question
3

Question
4

☐ 3 Clear operating principles are shared and sometimes discussed; Principles **often serve as guideposts for decision-making, especially** at higher levels of the organization

☐ 4 Clear operating principles are shared and explicitly articulated and discussed; Principles **regularly serve as guideposts for decision-making** at all levels of the organization

Question
5

☐ Not Applicable

☐ Do Not Know

Question
6

Skip this section & answer later



Save progress & finish later

← Back

Next →

ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
6 of 7 questions answered

Do our culture and values help us
operate effectively towards fulfilling our
mission and vision?

LEARNING AND
INNOVATION
0 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

VALUES

Do our culture and values help us operate effectively towards fulfilling our mission and vision?

Question
1

Are we as an organization creating impact?

1

Organization is not achieving its articulated theory of change

2

Organization has seen small progress across specified outcomes, but little progress towards overall theory of change

Question
2

3

Organization is making some progress towards achieving its articulated theory of change and has seen some improvement across specified outcomes

4

Organization is achieving its articulated theory of change and regularly sees improvement across specified outcomes

Question
3

Question
4

Not Applicable

Do Not Know

Question
5

Question
6

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered



STRATEGY
13 of 13 questions answered



LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered



FUNDING
11 of 11 questions answered



VALUES
7 of 7 questions answered



LEARNING AND
INNOVATION
0 of 15 questions answered

E

Do we have a performance assessment
system in place?

How well do we develop and manage
information?

Do we have a feedback and learning
assessment loop?

Can we innovate?

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a performance assessment system in place?

Question
1

Do we have performance targets in place across activities?

1

Targets are **nonexistent or few**; Targets are
vague, or confusing; **Not clearly linked** to
aspirations and strategy

2

Realistic targets exist in **some** key areas;
Mostly aligned with aspirations and strategy

Question
2

3

Quantified, aggressive targets in most
areas; **Linked** to aspirations and strategy

4

Limited set of **quantified, genuinely**
demanding performance targets in all
areas; Targets are **tightly linked** to
aspirations and strategy

Question
3☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst
your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



ASPIRATIONS
4 of 4 questions answered

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
1 of 15 questions answered

Do we have a performance
assessment system in place?

How well do we develop and manage
information?

Do we have a feedback and learning
assessment loop?

Can we innovate?

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a performance assessment system in place?

Question
1

Do we have good performance targets in place that drive action?

1

Targets **may change from year to year**;
Targets **largely unknown or ignored** by
staff (e.g., because unachievable)

2

Targets **may lack aggressiveness, or be
short-term**; Lack milestones, or **mostly
focused on "inputs"** (things to do right), or
often renegotiated; Staff **may or may not
know and adopt** targets

Question
2Question
3

3

Targets **mainly focused on
"outputs/outcomes"** (results of doing
things right) with some "inputs"; **Typically
multiyear** targets, though may lack
milestones; Targets **are known and
adopted by most staff who usually use
them** to broadly guide work

4

Targets are **output/outcome-focused** (i.e.,
results of doing things right, as opposed to
inputs, things to do right); **Have annual
milestones**, and are **long-term** nature;
Staff **consistently adopts targets and
works diligently** achieve them

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst
your organization here

Skip this section & answer later



Save progress & finish later

← Back

Next →

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

ASPIRATIONS

4 of 4 questions answered

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

43 of 43 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

2 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a performance assessment system in place?

Question 1

Do our metrics help us measure progress?

1

Any existing metrics are **hard to measure** or are **disconnected** from the goals, mission, and vision of the organization

2

Metrics are **in place** to track progress towards performance targets, but are **vague or unclear** and **may not be connected** to specific organizational activities

Question 2

Question 3

3

A set of **specific metrics** by which the organization can track progress is in place and they are **generally related** to the outcome goals for the organization's activities

4

Each strategic goal includes **1-3 specific metrics** by which the organization can **regularly track progress** towards the performance goal (e.g., increasing program sites tracking to increased constituent impact) and which are **directly tied to the outcomes** of organizational activity

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

?

Save progress & finish later

← Back

Next →

6.3

FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

3 of 15 questions answered



Do we have a performance assessment system in place?



How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

How well do we develop and manage information?

Question 4

Do we know what data we need and can we get it?

1

No significant data collection or access within organization or through partners, resulting in little use of data to improve organizational strategies, positions or strengthening of constituency

2

Rely on external organizations or partners to collect, access and organize any information needed for internal and external work, resulting in difficulty using data to improve organizational strategies, positions and strengthening constituency

Question 5

Question 6

Question 7

3

Sporadically collect and access **some** data, including one or two of following that are relevant to organizational activities: anecdotal data of stakeholders, public data sets, big data, opposition evidence and some original data, but **not able to regularly** update it or organize all of it for immediate use in improving strategies, positions and strengthening constituency

4

Regularly collect, access and then **organize** variety of data, including any of the following that are relevant to organizational activities: anecdotal data of stakeholders, public data sets, big data, opposition evidence and some original data; Dedicated staff maintain data and make it accessible for analysis, evaluation, and other internal and external needs (e.g. developing and tweaking strategy and positions and maintaining strong constituency)

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst

Skip this section & answer later



Save progress & finish later



Back

Next



FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

4 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

How well do we develop and manage information?

Question 4

Do we have capability to analyze data?

1

Little internal analysis is done and insights are **borrowed** from external sources

2

Data gathered or accessed by organization **sometimes** analyzed if it is not too complex (e.g. staff capabilities, time or resources or appropriate partnerships **do not** exist) and **most** new insight for organization come from **external** sources

Question 5

Question 6

Question 7

3

Data gathered or accessed by organization is analyzed up to a **medium level of complexity** either through internal capacities or partnerships in a way that leads organization **to better understand issues**

4

Data gathered or accessed by organization is **regularly** analyzed in **as complex of a way as is necessary** either through **deep** internal capacities or **strong** partnerships in a way that drives **significant new insight** for organization **and** field

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
5 of 15 questions answered

Do we have a performance
assessment system in place?

How well do we develop and manage
information?

Do we have a feedback and learning
assessment loop?

Can we innovate?

MARKETING AND
COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

How well do we develop and manage information?

Question
4

Do we understand our external landscape?

1

☐ Minimal knowledge and understanding of
other players, related issues and alternative
models in focus area

2

☐ Basic knowledge of other players, issues
and alternative models in focus areaQuestion
5Question
6

3

☐ Solid knowledge of other players, issues
and alternative models in focus area

4

☐ Extensive knowledge of other players,
issues and alternative models in focus areaQuestion
7☐ Not Applicable☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst
your organization here

[Skip this section & answer later](#)[Save progress & finish later](#)[Back](#)[Next](#)

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-133 Days left

Logout

12 of 15 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
6 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

How well do we develop and manage information?

Question 4

Do we have systems in place to capture and disseminate knowledge we generate and gather?

1

No formal systems to capture, document and disseminate internal knowledge

☐

2

Systems exist in a few areas but either not user friendly or not comprehensive enough to have an impact; Systems known by only a few people, or only occasionally used

☐

3

Well-designed, user-friendly systems in some areas but not fully comprehensive; Systems are known by many people within the organization and often used

☐

4

Well-designed, user-friendly, comprehensive systems to capture, document, and disseminate knowledge internally in all relevant areas; All staff aware of systems, knowledgeable in their use, and make frequent use of them

☐

☐

Not Applicable

☐

Do Not Know

Question 5

Question 6

Question 7

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

7 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a feedback and learning assessment loop?

Question 8

Do we use the information from our performance measurements to adapt?

Question 9

1 Performance assessment data may be analyzed, but it is not either not done rigorously or it is not incorporated into any decision-making

2 Performance assessment data is **analyzed**, but in either too basic or too complex of a way to be broadly useful; Results are **rarely put into an accessible form** that the organization can access broadly; **No process is in place** for incorporating analysis and learning into decision-making

Question 10

Question 11

3 Performance assessment data is **systematically analyzed**; Results are put into a form that can be **accessed by organization's leadership**; **Process is in place** for incorporating analysis and learning **into decision-making**4 Performance assessment data is **thoroughly and systematically analyzed**; Results are put into a form that can be **accessed throughout organization**; **Process is in place and utilized** for incorporating analysis and learning **into decision-making**

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



6.8

javascript:void(0);

FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

8 of 15 questions answered



Do we have a performance assessment system in place?



How well do we develop and manage information?



Do we have a feedback and learning assessment loop?



Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a feedback and learning assessment loop?

Question 8

Do we use insights our organization generates to adapt?

1

☐ Everyday work of staff and planning processes **rarely reflect** on organizational knowledge

2

☐ Organizational knowledge is applied in an **ad hoc** way to staff work and organizational planning processes; Mistakes are often made **multiple** times

Question 9

Question 10

Question 11

☐ **3** Some systems, processes and culture exist to help organizational knowledge **inform work of staff**, as well as **short- and long-term planning** processes **sporadically**; Mistakes repeated from time to time

4

☐ **Systems, processes and culture** ensure that organizational knowledge **always informs everyday work of staff**, as well as **short- and long-term planning** processes; Mistakes **rarely** repeated☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

 Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later

← Back

Next →

13 of 15 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
9 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a feedback and learning assessment loop?

Question 8

Do we use the insight we gather from monitoring our landscape to adapt?

Question 9

1 **Low** adaptability; Organization is virtually **static**, even when learning of big changes in landscape

2 **Limited** ability to adapt; Behavior (e.g. strategies, tactics, relationships, programs) based on **acquired understanding** of changing landscape

Question 10

3 **Good** ability to adapt; Behavior based on **acquired understanding** of changing landscape, but only **occasionally** carried out

4 **Refined ability and systematic tendency** to adapt; Behavior based on acquired understanding of changing landscape

Question 11

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

?

Save progress & finish later

← Back

Next →

FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

10 of 15 questions answered



Do we have a performance assessment system in place?



How well do we develop and manage information?



Do we have a feedback and learning assessment loop?



Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Do we have a feedback and learning assessment loop?

Question 8

Do we take action based on learning?

1

☐ **Limited ability** to modify existing or create new programs; Programs created largely **in response to funding** availability

2

☐ **Some ability** to modify existing programs and create new programs **primarily driven** by unmet needs of recipients and new insights

Question 9

Question 10

3

☐ **Demonstrated ability** to modify and fine-tune existing programs and create new programs based on new insights

4

☐ Ability and tendency to **efficiently and effectively adjust or create new programs** to meet the needs of potential service recipients in local area or other geographies that we identify as not being met based on new insights; use open source method to build off model

Question 11

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

11 of 15 questions answered



Do we have a performance assessment system in place?



How well do we develop and manage information?



Do we have a feedback and learning assessment loop?



Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Can we innovate?

Question 12

Do we manage to identify new program opportunities or adjustments?

Question 13

1 No assessment of gaps in ability of current program to achieve its goals**2** Limited assessment of gaps in ability of existing program to achieve its goals

Question 14

3 Occasional assessment of gaps in ability of existing program to achieve goals, with some adjustments made; **At times work collaboratively with other organizations to identify new ideas****4** Assessment of gaps in ability of existing programs to achieve goals and adjustments to make is a **regular part of planning processes; Consistently work collaboratively with other organizations to identify new ideas**

Question 15

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later

← Back

Next →

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

12 of 15 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

12 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Can we innovate?

Question 12

Do we have a track record of developing new ideas and approaches?

1

Organization has **maintained same approaches** for years; New technologies are **not accessed or incorporated**

2

Organization has identified **some** innovative changes **at times**, but **lacks** the internal processes to do it systematically or does **not prioritize** them; **Follow-through** on trying identified innovations is **inconsistent**; Use of technology **keeps pace** with other similar organizations

3

Have had **some success** developing **new** ideas, products or services through **internal structures that facilitate** building on internal learning and identifying new opportunities or processes **and** building out new ideas through thought and actual experimentation; Use of technology **keeps pace** with other similar organizations

4

Have a **strong track-record** of developing **path-breaking** ideas, products or services through **well-defined internal processes** to build on internal learning and identify new opportunities or processes; Relevant new technologies are **rapidly incorporated** into current approaches or **prompt step-change** improvement

Not Applicable

Do Not Know

Question 13

Question 14

Question 15

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

13 of 15 questions answered



Do we have a performance assessment system in place?



How well do we develop and manage information?



Do we have a feedback and learning assessment loop?



Can we innovate?



MARKETING AND COMMUNICATION

0 of 6 questions answered

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Can we innovate?

Question 12

Do we encourage experiments with new approaches and do they generate insight?

Question 13

1 Trying innovative approaches is **not rewarded and seen as a distraction**; Learnings from any new approaches are **not captured or learned from**2 Trying innovative approaches is **accepted**, if staff decides to take initiative; Experiments are **not usually** rigorously designed, but general learnings from any new approaches are **incorporated**

Question 14

3 Trying innovative approaches is **encouraged** once ideas are surfaced, if staff decides to take initiative; Experiments are **well-designed**, though often not scientific, learnings from any new approaches are **incorporated**4 Organization has **regular process** and **provides staff with time** for identifying innovative opportunities and experimenting with them; **Seen as a leader in the field** for developing new approaches to existing challenges; Experiments are **designed rigorously to uncover new insights** and learnings are rapidly incorporated

Question 15

☐ Not Applicable☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



12 of 15 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
14 of 15 questions answered

Do we have a performance assessment system in place?

How well do we develop and manage information?

Do we have a feedback and learning assessment loop?

Can we innovate?

MARKETING AND COMMUNICATION
0 of 6 questions answered

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

LEARNING AND INNOVATION

Can we innovate?

Question 12

Do we manage to apply program learnings in real-time and beyond specific programs?

Question 13

1

Program learnings **remain limited to specific programs** and are **not shared more broadly** nor drive innovation **beyond related program**

2

Organization **sometimes identifies themes emerging** from program or other organizational learnings and sometimes **applies** them to program creation or innovation

Question 14

3

Organization **sometimes identifies themes emerging** from program or other organizational learnings and **often applies** them to program creation or innovation

4

Organization **identifies themes emerging** from program or other organizational learnings and **readily applies** them to program creation or innovation in real-time

Question 15

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
0 of 6 questions answered

How well do we communicate?

How well do we build the awareness and
reputation of our brand?

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MARKETING AND COMMUNICATION

How well do we communicate?

Question
1

Do we communicate effectively internally?

Question
2Question
3Question
4Question
5

1 Primary source of internal communication is rumors; Quality internal communication only done sporadically and may or may not be trusted

2 No processes exist for how and what to communicate with **most** of staff, but information is **sometimes** shared, though it **rarely** drives improvement of staff effectiveness, connectedness to organization or motivation; Shared **sporadically**, staff reads, but may **gossip** about information once received; Only **some staff** feel heard by management

3 Basic processes exist for how and what to communicate with **most** of staff; Information **sometimes** improves staff effectiveness, connectedness to organization and motivation; Shared **regularly**, most staff takes time to absorb information; General staff has ability to communicate with **at least some** of management

4 Clear processes and systems exist for how and what to communicate with **entire** staff; **High** quality information that improves staff effectiveness, connectedness to organization and motivation is shared **regularly**; Staff takes time to **absorb information** and feels **informed and listened** to; General staff has **widely-known and utilized** methods of communicating **broadly** with management

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered

LEARNING AND
INNOVATION

15 of 15 questions answered

MARKETING AND
COMMUNICATION

1 of 6 questions answered



How well do we communicate?

How well do we build the awareness and
reputation of our brand?

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION
INFRASTRUCTURE AND
TECHNOLOGY

0 of 9 questions answered

NAVIGATION

MARKETING AND COMMUNICATION

How well do we communicate?

Question
1

Do we communicate well externally?

1

No processes in place for developing communication with external audiences; Information released by organization **may be unprofessional or poorly messaged**, organization is not able to quickly react to opportunities to communicate

2

Limited processes exist for external communications beyond one-off quality controls (i.e. ED review required); Quality of information and materials release **inconsistent**, organization inconsistently reacts to opportunities to communicate

Question
3

3

Basic processes and systems, which may include accountable staff, exist for external communication; Quality, but not professional, information and materials shared **regularly**; Communications **integrated** with brand management activities; Organization is somewhat able to quickly react to opportunities to communicate

4

Clear processes and systems, including accountable staff, exist for how and what to communicate with external audiences; **highly professional, tailored materials** and information shared **regularly**; Communication is **tightly** integrated with brand management activities; Organization is able to quickly react to opportunities to communicate

Question
4

4

Question
5

5

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-133 Days left

Logout

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
15 of 15 questions answered

MARKETING AND COMMUNICATION
2 of 6 questions answered

How well do we communicate?

How well do we build the awareness and reputation of our brand?

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

MARKETING AND COMMUNICATION

How well do we communicate?

Question 1

Do we communicate using consistent stories?

1

No stories and anecdotes shared by organization with broader audience

2

Few stories and anecdotes shared by organization with broader audience, adopted inconsistently by some members of the organization

3

Some stories and anecdotes shared by organization with broader audience, adopted by some members of the organization

4

Well-articulated stories and anecdotes adopted by all members of the organization to garner support for cause and consistently shared with broader audience in communications materials

Question 2

Question 3

Question 4

Not Applicable

Do Not Know

Question 5

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

7.3

javascript:void(0);

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
3 of 6 questions answered

How well do we communicate?

How well do we build the awareness and
reputation of our brand?

ADVOCACY
0 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MARKETING AND COMMUNICATION

How well do we communicate?

Question
1

Do we use media effectively?

1

Rarely access any type of media in way that reaches meaningful audiences, though it could significantly push organizational mission forward

2

Have **sporadic** and/or **singular** ways of accessing media (i.e. only pitch to newspapers or sometimes post messages online), but do not reach meaningful audiences that would be relevant for organizational goals; **Not** done in **targeted** way **using knowledge** of audience

Question
2Question
3

3

As appropriate for organizational goals, use and access **a few different** types of relevant media (i.e. mainstream, ethnic, online, social, written, etc) to reach **a few** relevant audiences (mainstream, ethnic, groups, individuals, etc) through those media; Organization **attempts** to adjust tactics and **sometimes adjust for each** media push based on general, but not data-based, sense of audience needs and interests

4

As appropriate for organizational goals, **regularly** use and access **multiple** types of media (i.e. mainstream, ethnic, online, social, written, etc) to reach **multiple** relevant audiences (mainstream, ethnic, groups, individuals, etc) through those different media; Tactics **adjust for each** media push based on **deep understanding** of the needs of the audience, including **ethnic media with translated messaging**, **online viral** pushes and access to mainstream media when appropriate

Question
4Question
5☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE: OCTOBER 31, 2013

-133 Days left

Logout

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

43 of 43 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

4 of 6 questions answered

How well do we communicate?

How well do we build the awareness and reputation of our brand?

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

MARKETING AND COMMUNICATION

How well do we communicate?

Question 1

Do we manage our stakeholders well?

1

Little external focus or ability to understand stakeholders beyond general impressions or assumptions

2

Few processes in place to gather information about stakeholder **needs and impressions**, but draw **conclusions from anecdotal** information and work to **respond**

3

Some internal or external **systems and** processes in place to gather and assess a **few types** of data to have **general** understanding of **general** stakeholder **needs and impressions** and work to **respond**

4

Strong internal or external systems and processes in place to gather and assess **range** of data and **accurately** understand **segmented** groups of stakeholder **needs and impressions** and to then **respond in appropriate, tailored** ways

Not Applicable

Do Not Know

Question 2

Question 3

Question 4

Question 5

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

Back

Next

7.5

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered

LEARNING AND
INNOVATION

15 of 15 questions answered

MARKETING AND
COMMUNICATION

5 of 6 questions answered



How well do we communicate?

How well do we build the awareness and
reputation of our brand?

ADVOCACY

0 of 44 questions answered

MANAGING PROCESSES

0 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY

0 of 9 questions answered

NAVIGATION

MARKETING AND COMMUNICATION

How well do we build the awareness and reputation of our brand?

Question
6

Do we build our brand effectively?

1

☐ No mechanisms to formulate, nurture, protect or leverage brand; Brand is not unique in non-profit space

2

☐ **No formal internal processes** to manage brand, though reactively work to define it, nurture existing public impression of it and/or protect it; Unable to leverage brand either because lack internal skills or brand is damaged

3

☐ **Manage** brand of organization (i.e. formulate, nurture **or** protect) to **build or maintain** external credibility; **Work** to leverage brand to **stimulate interest** in organizational objectives, including attracting followers and donors

4

☐ **Actively manage** brand of organization (i.e. formulate, nurture and protect) to **maintain** external credibility; Actively leverage brand with strong results from activities **stimulating interest** in organizational objectives, including attracting followers and donors; Brand is unique in non-profit space☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

 Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
0 of 44 questions answered

Do we have a clear and compelling theory
of change for our advocacy work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a clear and compelling theory of change for our
advocacy work?

Question
1

Is what we are trying to accomplish through advocacy clear and
broadly understood?

Question
2

1
☐ Articulation of desired advocacy objectives
(e.g., specific policy outcomes, attitude
and/or behavior change) is **non-existent or
overly general** such that progress or
success is **hard to assess**, or there is
disagreement about the **relative
importance of** advocacy objectives within
the organization

2
☐ **Generic** description of advocacy objectives
that are **understood by the leadership
team and board, but not consistently
across all levels** of the organization

Question
3

Question
4

3
☐ **Clearly articulated and specific**
description of **most, but not all**, advocacy
objectives, **most of which are generally
understood** throughout the organization
(i.e., pockets of excellence exist, but
understanding is not uniform across
objectives)

4
☐ **Clearly articulated and specific**
descriptions of **all** advocacy objectives, **all**
of which are **very well understood**
throughout the organization (i.e.,
consistency across organization in clarity
and objectives)

Question
5

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
1 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a clear and compelling theory of change for our
advocacy work?

Question
1

Does what we are trying to accomplish through advocacy have a
compelling benefit and is it inspiring to others?

Question
2

1 Specific advocacy objectives (e.g., policy
outcomes, attitude and/or behavior
changes) **will not deliver significant
benefit** to constituents

2 Specific advocacy objectives will deliver
some benefit to constituents

Question
3

3 Specific advocacy objectives will deliver
significant benefit to constituents

4 Specific advocacy objectives will be of
transformative benefit to constituents;
Benefit is broadly understood; Objectives
will **inspire others external to the
organization to become more engaged** in
the issues being advocated

Question
4

Not Applicable

Do Not Know

Question
5

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
2 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a clear and compelling theory of change for our advocacy work?

Question
1

How well aligned is the advocacy work with our organization's mission and vision?

Question
2

1 Advocacy objectives (e.g., policy outcomes, attitude and/or behavior change) **are not well aligned to** the scope of our mission and vision; Advocacy objectives may be **overly influenced** by a single party (e.g., Board, major funder, partner organization, Executive Director)

2 Advocacy objectives **are somewhat aligned** with the organization's mission and vision, **with some information** to support the connection

Question
3

3 Advocacy objectives **are well aligned** with the organization's mission and vision and the **connection is reinforced** through credible research and/or analysis

4 Advocacy objectives have been **chosen** based on **credible research and analyses from multiple sources** to ensure they are the **most critical objectives to pursue** in line with the organization's mission and vision

Question
4

Question
5

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
3 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a clear and compelling theory of change for our
advocacy work?

Question
1

How well can we measure the progress and success of our advocacy
work?

Question
2

1 **No specific measures** are in place to track
progress towards advocacy objectives (e.g.,
policy outcomes, attitude and/or behavior
change)

2 **A limited set of measures** exist to track
progress towards advocacy objectives;
Measures are **limited to either short- or
long-term** only and **do not encompass the
full set** of advocacy objectives

Question
3

3 **Measurable, specific, realistic, and
time-based** performance indicators exist to
track progress towards and achievement of
the **full range** of advocacy objectives;
Measures may be **limited to either short-
or long-term** and **may not include process**
measures that track progress towards
outcomes

4 **A range of specific, realistic, and
time-based measures** exist to track
progress towards advocacy objectives;
Measures **include both long-term** (e.g., 3-5
year) targets and **interim** (e.g., 6-12 month)
milestones **and are supported by process
measures** (e.g., events held/ stakeholders
engaged) that track progress toward
outcomes

Question
4

Question
5

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
4 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a clear and compelling theory of change for our advocacy work?

Question
1

How well connected is our advocacy work with the rest of our organization's core work?

Question
2

1 Non-advocacy work (e.g., programs and partnerships) is **disconnected** from advocacy efforts

2 Some non-advocacy work has **some connection** to advocacy efforts (e.g., non-advocacy work provides anecdotal insights to advocacy partners)

Question
3

3 Some non-advocacy work has **specific connections** to advocacy efforts (e.g., non-advocacy work provides credible insight and data to support advocacy, or builds connections and/or credibility with advocacy partners)

4 Full portfolio of non-advocacy work has a **specific connection** to advocacy efforts (e.g., non-advocacy work provides credible insight and data to support advocacy, or builds connections and/or credibility with advocacy partners)

Question
4

Not Applicable

Do Not Know

Question
5

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
5 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy planning
process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have an effective advocacy planning process?

Question
6

How well does our organization understand what it will take to be successful in meeting advocacy objectives?

Question
7

1

Organization has a **vague understanding** of the conditions needed to achieve advocacy objectives (e.g., votes or support needed, commitment from stakeholders and influencers, related issues that will impact advocacy progress and outcomes), with limited understanding of the current status of each

Question
8

2

Organization has a basic understanding of the set of conditions needed to achieve most advocacy objectives, the **current status** of each, and **some thinking** around proposed strategies to **address a few significant barriers**

Question
9

3

Organization **has clearly articulated** the set of conditions needed to achieve most advocacy objectives, the **current status** of each, and **proposed strategies** to address **some significant barriers**

Question
10

4

Organization **has clearly articulated** the set of conditions needed to achieve all advocacy objectives, the **current status** of each, and **multiple forward-looking scenarios and strategies** to address barriers

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
6 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have an effective advocacy planning process?

Question
6

Does our organization regularly revisit and revise its advocacy plans?

1

No planning process for advocacy activities
exist; Advocacy activities **are largely ad hoc**
or are reliant on objectives and approaches
that **have not been reviewed or updated,**
formally or informally, in the last 6
months

2

Advocacy planning **occurs regularly** on at
least an **annual basis**; **Informal reviews**
happen every 6 months

Question
7Question
8

3

Advocacy planning **occurs regularly** on at
least an **annual basis** with **planned**
interim discussions that incorporate new
information and changing conditions

4

Advocacy planning process **occurs**
regularly on at least an **annual basis** with
planned interim discussions and
as-needed checkpoints that incorporate
new information and changing conditions

Question
9Question
10

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered

LEARNING AND
INNOVATION

15 of 15 questions answered

MARKETING AND
COMMUNICATION

6 of 6 questions answered



ADVOCACY

7 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?Do we have an effective advocacy
planning process?Are we well organized to pursue our
advocacy objectives?Are we aware of the complete issue
landscape and key players?Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have an effective advocacy planning process?

Question
6Is someone clearly accountable for driving a successful advocacy
planning process?Question
71 Planning process has **no clear owner** who
is **accountable** for the quality of the
process or the resulting plan2 Point person exists to **coordinate** the
planning process and ensure it runs
smoothly, but **without accountability** for
the quality of the process or the resulting
planQuestion
83 Clear **owner who is accountable** for
leading a high-quality planning **process**4 Clear **owner who is accountable for
leading** a high-quality planning **process** and
for **delivering a high-quality plan**; Quality
of plan and process **incorporated into the
owner's performance evaluation** and
includes feedback from senior leadershipQuestion
9

Not Applicable

Do Not Know

Question
10

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
8 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship

NAVIGATION

ADVOCACY

Do we have an effective advocacy planning process?

Question
6

How well do we use new information to inform our advocacy planning?

Question
7

1 Planning revisions are **largely based on anecdotal evidence** and staff perceptions of changes in conditions; **Minimal use** of constituent feedback or performance data

2 Planning revisions include **an ad-hoc set of new information**, though **some relevant data** (e.g., annual constituent survey, updated political climate analysis, reflection on recent efforts) **is missing**; **Limited use of performance data**

Question
8

3 Planning process includes **new data and insight** identified by staff as high priority that **includes constituent feedback and changes in political/social landscape**, as well as feedback on **recent performance**

4 Planning process is **driven** by a regularly **refreshed, standard set data that covers a broad range** of issues including constituent feedback, changes in political/social landscape, and recent performance; **multiple avenues for constituent input** into advocacy goals are in place; continued relevance of goals is **regularly tested**

Question
9

Question
10

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

Back

Next

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-133 Days left

Logout

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
15 of 15 questions answered

MARKETING AND COMMUNICATION
6 of 6 questions answered

ADVOCACY
9 of 44 questions answered

Do we have a clear and compelling theory of change for our advocacy work?

Do we have an effective advocacy planning process?

Are we well organized to pursue our advocacy objectives?

Are we aware of the complete issue landscape and key players?

Do we have a system of relationship

NAVIGATION

ADVOCACY

Do we have an effective advocacy planning process?

Question 6

How rapidly can we adjust our approach as external conditions (e.g., the political landscape, funding) change?

1

Unable to revise and deploy an updated approach in response to significant changes in external conditions in a timely fashion (e.g., relevant policy changes, political power shifts, change in the approach or position of key stakeholders)

2

Usually able to revise and deploy an updated approach in a timely fashion as external conditions evolve

3

Able to rapidly adapt and take advantage of new opportunities as external conditions evolve

4

Able to anticipate and proactively prepare for changes in the external conditions, to rapidly adapt and take advantage of new opportunities

Not Applicable

Do Not Know

Question 7

Question 8

Question 9

Question 10

Want to leave a comment?

Skip this section & answer later

Save progress & finish later

Back

Next

8.10

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
10 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question
11Are there enough people suitably focused on our advocacy work to
drive the progress we aspire to?Question
12

1
☐ Staff capacity (number of individuals or
amount of individuals' time) committed to
driving the advocacy objectives (i.e., policy,
attitude, or behavior change) is **insufficient**
and/or too **fragmented** across **additional**
competing priorities to realize the impact
desired; **Little capacity planning in place**

2
☐ Staff capacity committed to driving the
advocacy objectives is mostly **sufficient**;
Individuals engaged in advocacy **are able to**
give appropriate time to advocacy
activities despite potential competing
priorities; **Some capacity planning in place**

Question
13

3
☐ **Sufficient** staff capacity committed to
driving the advocacy objectives, though
organization is **very stretched in peak**
periods; Capacity planning takes place **at**
least annually

4
☐ **Sufficient** staff capacity committed to
driving the advocacy objectives with
additional capacity available for peak
activity times; **Capacity planning is**
scheduled regularly to respond to evolving
conditions

Question
14Question
15☐ Not Applicable☐ Do Not KnowQuestion
16

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

- STRATEGY
13 of 13 questions answered
- LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered
- FUNDING
11 of 11 questions answered
- VALUES
7 of 7 questions answered
- LEARNING AND
INNOVATION
15 of 15 questions answered
- MARKETING AND
COMMUNICATION
6 of 6 questions answered

- ADVOCACY
11 of 44 questions answered
- Do we have a clear and compelling
theory of change for our advocacy
work?
- Do we have an effective advocacy
planning process?
- Are we well organized to pursue our
advocacy objectives?
- Are we aware of the complete issue
landscape and key players?
- Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question 11	Across our team, do we have the skills required to be successful?	
Question 12	1 Individuals do not currently have the right skills needed to be effective <input type="radio"/>	2 Taken together , individuals engaged in the advocacy effort have some of the right skills, but important gaps exist <input type="radio"/>
	3 Taken together , individuals engaged in advocacy have all the right skills (e.g. one/some have policy knowledge, while another/others have organization skills) <input type="radio"/>	4 Each individual engaged in the advocacy effort has many of the right skills and the organization is not dependent on one person for any specific skill (e.g., policy knowledge, organizing skills) <input type="radio"/>
Question 13		
Question 14	<input type="radio"/> Not Applicable	<input type="radio"/> Do Not Know
Question 15		
Question 16		

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
12 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question
11Across our team, do our dedicated resources have the previous
experience required to be successful?Question
12

1

Individuals **do not currently** have the right
depth of experience needed to be effective

2

Taken together, the advocacy team has
some amount of experience, but **are not**
adequately mentoring individuals to help
them gain experience and insightQuestion
13

3

Taken together, the advocacy team has **a**
comprehensive depth of experience and
mentor those who do not yet have
experience and insight

4

The advocacy team has the
comprehensive depth of experience
needed to be effective (including
senior-level experience helping to relate to
senior peers in other organizations); Those
without the a breadth of experience **are**
actively mentored by others on the team;
The team is **not solely dependent** on
experience of any one individualQuestion
14Question
15

Not Applicable

Do Not Know

Question
16

Skip this section & answer later



Save progress & finish later



Back

Next



- STRATEGY
13 of 13 questions answered
- LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered
- FUNDING
11 of 11 questions answered
- VALUES
7 of 7 questions answered
- LEARNING AND
INNOVATION
15 of 15 questions answered
- MARKETING AND
COMMUNICATION
6 of 6 questions answered
- ADVOCACY
13 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question
11Across our team, do our dedicated resources have the networks
required to be successful?Question
12

1 Individuals **do not** have the necessary
breadth of networks (e.g., personal
connection to constituent groups - if
important - and relevant stakeholders)
needed to be effective

2

Taken together, the advocacy team has
some of the right connections needed to be
effective, but **important gaps** exist

Question
13

3 **Taken together**, the advocacy team has **the
breadth of networks necessary to be
effective**, though connections may be
narrowly focused (e.g., to a specific level of
government or specific group of
stakeholders); **No significant gaps** exist

4

The advocacy team has **the breadth of
networks necessary to be effective**,
including connections at **multiple levels
and with multiple groups** of stakeholders;
The team is **not solely dependent** on the
network of any one individual

Question
14

Not Applicable

Do Not Know

Question
15Question
16

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
14 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question
11Have we structured and/or coordinated our internal advocacy team
in an effective way?Question
12

1 Roles and responsibilities are **unclear** and
insufficiently communicated; Reporting
structure is unclear resulting in
challenging work environment and little
accountability

2 Roles and responsibilities somewhat in flux
and **not consistently** communicated;
Reporting **structure is unclear** resulting in
challenging work environment and little
accountability

Question
13

3 Roles and responsibilities and reporting
relationships are **well-structured and
aligned** with advocacy objectives; Roles and
responsibilities are **clear, facilitating work
and accountability across the team**

4 Roles and responsibilities are **highly** aligned
with advocacy objectives; **High level of
clarity** in roles and responsibilities and
strong accountabilities across the team

Question
14

Not Applicable

Do Not Know

Question
15Question
16

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
15 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we well organized to pursue our advocacy objectives?

Question
11

How well is the advocacy work situated within the broader organization to support impact?

Question
12Question
13Question
14Question
15Question
16

1

Position of advocacy work within the organization is **misaligned** with advocacy objectives, (could be due to legacy structure or personalities (e.g., national group based in DC but majority of advocacy occurs at a local level)); Advocacy activity is **fragmented** with **no specific accountability** for meeting objectives

2

Position of advocacy work within the organization is **aligned** to the **primary** advocacy objective(s), though **inefficiencies exist**; Senior-most person who has a primary role in advocacy is **not at a sufficiently high level** in the organization and **lacks sufficient authority and decision-making power** and may be challenged by competing organizational priorities; **Unclear accountability** for meeting advocacy objectives

3

Position of advocacy work within the organization is **aligned to the primary type** of advocacy objective, with **minimal inefficiencies** in addressing other objectives; Senior-most person with primary role in advocacy is **at a sufficiently high level** in the organization but **may lack sufficient authority and decision-making power**; May be challenged by **competing** organizational priorities; **Clear senior-level accountability** for meeting advocacy objectives, but not tied directly to advocacy team

4

Position of advocacy work within the organization is **clear** (e.g., national group if objectives primarily national; Diffused expertise in multiple field-level personnel if advocacy is driven through field interactions; Hybrid as appropriate) and **is suitably complex** as needed; Senior-most person who has a primary role in advocacy is **at a sufficiently high level** in the organization with the **appropriate level of authority and decision-making power**; Accountability for success **exists with all engaged** in advocacy

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
16 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we aware of the complete issue landscape and key players?

Question
17

How sophisticated is our awareness of issues that relate to advocacy objectives?

Question
18

1

Few individuals within the organization have a **basic** understanding of relevant issues related to advocacy focus areas (e.g. broader context of advocacy priorities) and how these impact advocacy objectives, but **no systematic processes are in place** to deepen and update the team's understanding of related issues

2

Some individuals within the organization have **general, but static**, idea of relevant issues related to advocacy focus areas with a **peripheral understanding** of interrelationships between issues; **No clear accountability exists** for documenting or tracking related issues on an ongoing basis

Question
19

3

Organization has a **generally** articulated, **though static** overview of the issues that are relevant to advocacy focus areas; A **static** understanding of the interrelationships between issues is assumed, though not regularly **discussed**; **Some** accountability exists for documenting and tracking related issues on an ongoing basis

4

Organization has a **clearly** articulated, **dynamic** understanding of the issues that are relevant to advocacy focus areas; Team members regularly **discuss and understand** the interrelationships between issues; **Clear** accountability exists for documenting and tracking related issues on an ongoing basis

Question
20

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
17 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we aware of the complete issue landscape and key players?

Question
17

How well does our organization understand the key players in the space being addressed?

Question
18

1 Few individuals within the organization have **basic understanding** of who the key players are and how they impact advocacy objectives; **no systematic processes are in place** to deepen and update the team's understanding of key players

2 Some individuals within the organization have **general, but static**, understanding of key players and how they impact advocacy objectives; **peripheral understanding** of relationships between players; **No accountability exists** for documenting or tracking key players on an ongoing basis

Question
19

3 Organization has a **general though static** understanding of key players and how they impact advocacy objectives; **static understanding** of relationships between players exists, though not regularly discussed; **Some accountability** exists for documenting and tracking players on an ongoing basis

4 Organization has a **clearly articulated, dynamic** understanding of key players (including individuals and organizations) and how they impact advocacy objectives; Team members **understand and regularly discuss the relationships** between issues and how important players interact with those issues; **Clear accountability** exists for documenting and tracking key players on an ongoing basis

Question
20

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE

OCTOBER 31, 2013

-133 Days left

Logout

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF AND VOLUNTEERS

43 of 43 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

6 of 6 questions answered

ADVOCACY

18 of 44 questions answered

Do we have a clear and compelling theory of change for our advocacy work?

Do we have an effective advocacy planning process?

Are we well organized to pursue our advocacy objectives?

Are we aware of the complete issue landscape and key players?

Do we have a system of relationship

NAVIGATION

ADVOCACY

Are we aware of the complete issue landscape and key players?

Question 17

How well are we positioned to understand and respond to those who oppose our advocacy objectives?

Question 18

1

Minimal insight into the interests and positions of adversaries; **Adversaries drive the framing** of issues; Actions by adversaries **significantly distract** organization from making progress against its advocacy objectives

2

Basic insight into the interests and positions of adversaries; **Adversaries often drive the framing** of issues; Actions by adversaries **often distract** organization from making progress against its advocacy objectives

Question 19

3

Solid insight into the interests and positions of adversaries; **organization drives the framing** of issues **more often than not**; Actions by adversaries **may distract** organization from making progress against its advocacy objectives at times; Some examples of **finding common ground** and influencing adversaries to **change their positions**

4

Deep insight into the interests and positions of adversaries; typically **able to drive the framing** of issues; Sometimes able to **use adversary actions as a way to accelerate** organization's advocacy objectives; **Many** examples of **finding common ground** and influencing adversaries to **change their positions**

Not Applicable

Do Not Know

Question 20

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst

Skip this section & answer later

Save progress & finish later

Back

Next

8.19

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
19 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship

NAVIGATION

ADVOCACY

Are we aware of the complete issue landscape and key players?

Question
17

How accessible is our information related to advocacy issues and is new information appropriately codified?

Question
18

1 No standard processes in place to document or share information on advocacy issues with the wider organization (e.g. fact sheets)

2 Little documentation in place; Existing documentation is **difficult** for relevant members of organization to access; Information is documented in original form with **little to no synthesis**; **Relevant people do not have a means to** rapidly share information with others in organization

Question
19

Question
20

3 **Solid documentation** in an easy-to-use format (e.g., issue one pagers, fact sheets, annual report, year in review, bios) including **some synthesis** is available to relevant people in organization; **Some** informal processes in place for synthesizing and sharing information learned with others in organization

4 Extensive documentation in an easy-to-use format with synthesis relevant to the organization is accessible from a standard location and **readily** available to relevant people in organization; Informal and formal **processes in place** for synthesizing and sharing information learned with others in the organization (e.g., shared folders, intranet, library, process, incentives)

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
20 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How well are we connected to the individuals or groups we are working to serve?

Question
22

1

Organization **sporadically** communicates to **general** external audience; **Struggles to find people to call on** when better understanding of an issue or action in support of advocacy objectives is needed; Known in **only small pockets** of the population it serves

2

Organization **communicates** with the **general** group of constituents **sporadically**; **Sometimes** can engage constituents to build their understanding and engagement on an issue; **Known in many groups and well-known in some groups** within the population it serves

Question
23

Question
24

3

Organization **communicates** with **multiple groups** of constituents regularly; **Sometimes seen as the point of contact** for information and support on advocacy focus areas and **sometimes** make connections between select groups; **Well-known in many groups** within the population it serves

4

Organization has **dynamic** relationships with **many diverse groups** of constituents and engages in regular communication; Serves as the point of contact for information and support on advocacy focus areas; Is able to mobilize all **or** specific groups of constituents for **authentic** action in support of advocacy objectives when necessary; **Universally well-known** within the population it serves

Question
25

Question
26

☐

Not Applicable

☐

Do Not Know

[Skip this section & answer later](#)

?

[Save progress & finish later](#)[← Back](#)[Next →](#)

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
21 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How well does the organization engage the individuals or groups we are working to serve?

Question
22

1
☐ **Constituents rarely** participate in the advocacy efforts; **Minimal voluntary engagement** in the work by constituents; Constituents **rarely interact with each other** independent of the advocacy organization; **Spaces for interaction** (e.g., online forums, in-person meeting places) are non-existent

2
☐ **Some constituents** participate in the advocacy efforts; **Some voluntary engagement** in the work by constituents; Constituents **sometimes interact with each other** independent of the advocacy organization; **Limited spaces for interaction** exist or are minimally used

Question
23Question
24

3
☐ **Many constituents** participate in the advocacy efforts; **Regular voluntary engagement** in the work by constituents; Constituents **regularly interact with each other** independent of the advocacy organization; **Spaces for interaction** exist and are often used

4
☐ A **broad set of constituents** with the diversity of knowledge, skills, and capacity to achieve goals are **active participants** in the advocacy efforts; **High-levels of voluntary engagement** in the work by constituents; Constituents **frequently interact with each other** independent of the advocacy organization; Ample, **well-designed spaces for interaction** exist and are often used

Question
25Question
26☐ Not Applicable☐ Do Not Know

Skip this section & answer later



Save progress & finish later

← Back

Next →

▼ STRATEGY
13 of 13 questions answered

▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND
INNOVATION
15 of 15 questions answered

▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered

▲ ADVOCACY
22 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How well do we partner and align with others in mutually beneficial ways?

Question
22

1 Organization finds it **challenging** to form reliable or lasting partnerships in support of advocacy objectives

2 Organization forms **select** relationships with **small number of** organizations or forms **ad hoc** partnerships with other organizations; Shared **objectives may or may not be** generally understood; Partnerships are **only sometimes** mutually beneficial

Question
23

3 Organization forms **dynamic** relationships with **other** organizations in which each one's independent goals and shared **objectives are generally** understood; Partners **may change too frequently to establish strong relationships**; Partnerships are **generally mutually** beneficial

4 Organization forms dynamic and sustainable relationships with **many diverse** organizations in which independent goals and shared **objectives are clear**; New partnerships consistently formed as needed; Partnerships have sense of **shared responsibility** for outcomes for each other's policy objectives that is beneficial to both parties

Question
24

Question
25

Not Applicable

Do Not Know

Question
26

Skip this section & answer later



Save progress & finish later



Back

Next



- ▼ STRATEGY
13 of 13 questions answered ✓
- ▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered ✓
- ▼ FUNDING
11 of 11 questions answered ✓
- ▼ VALUES
7 of 7 questions answered ✓
- ▼ LEARNING AND
INNOVATION
15 of 15 questions answered ✓
- ▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered ✓

- ▲ ADVOCACY
23 of 44 questions answered ✓
- Do we have a clear and compelling theory of change for our advocacy work? ●
- Do we have an effective advocacy planning process? ●
- Are we well organized to pursue our advocacy objectives? ●
- Are we aware of the complete issue landscape and key players? ●
- Do we have a system of relationship management? ●

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How well are we connected with the right policymakers, regulatory bodies, and other individuals who can help us to advance our objectives?

Question
22

1 Organization is **beginning** to build relationships with legislators, regulators, administrators, policymakers or political groups, starting with **singular personal** relationships that **lack sustainability** through political cycles

2 **Few individuals in the organization** have relationships with a **select group** of legislators, regulators, administrators, policymakers, their staff, or political groups, but relationships **lack sustainability** through political cycles and are rarely **at the level of government** needed to advance advocacy issues

Question
23Question
24

3 **Several individuals in the organization** have strong and sustainable relationships with **select groups** of legislators, regulators, administrators, policymakers, their staff, or political groups; Relationships **may** exist at more than one level and are **often at the level of government needed** to advance advocacy issues

4 Organization has **institutionalized** strong and sustainable relationships with legislators, regulators, administrators, policymakers, their staff, **and** groups of more than one political persuasion, as well as at **diverse** levels of government needed to advance advocacy issues

Question
25Question
26

Not Applicable

Do Not Know

Skip this section & answer later ?

Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
24 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How effectively do we work with policymakers?

1

Minimal ability for organization to move policymakers to action or offer mutually beneficial working relationship with any potential contacts; **Lobbying is avoided** due to lack of understanding of how it could be done legally

2

Organization **struggles** to move policymakers to action, even when applying **pressure**; Boundaries between advocacy and policy are **not well** understood and **and/or not used** effectively

Question
22

Question
23

Question
24

Question
25

Question
26

3

Organization sometimes **able** to move policymakers to action, but it is often **through pressure** rather than a mutually beneficial relationship; Processes for working with policymakers are loosely defined; **Strong** organizational understanding of advocacy versus policy boundaries; **Sometimes called on** as source of support and/or expertise on related issues

4

Track record of moving policymakers to action in support of advocacy goals; Organization has **established processes** for working with policymakers, including dedicated resources and a **strong** organizational understanding of advocacy versus policy boundaries; **Regularly serve as a source of support** and/or expertise for policymakers on related issues; Policymakers adopt issue framing or communication messages; Can **recommend or facilitate courses of action** to benefit policymakers

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
25 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we have a system of relationship management?

Question
21

How well are we using data about constituents, their challenges, and related policies to support our advocacy work?

Question
22

1

No significant data collection or access within organization or through partners, resulting in **little use of data** to improve advocacy strategies, positions or strengthening constituency; **Unable to make estimates** by combining multiple data sources (e.g., statistics, anecdotal evidence, related research)

2

No proactive collection, access, or organization of data for advocacy work **either internally or with partners**; Reliance on external organizations/partners for information, resulting in **data collection and management challenges**; **Sometimes able** to make estimates (e.g., of impact of policy changes) by combining multiple data sources

Question
23Question
24Question
25Question
26

3

Sporadic collection and access of data, **either internally or through strong partnerships**, including one or more of the following: anecdotal data from stakeholders, public data sets, opposition evidence and some original data sources; **Unable to regularly update or organize** data for immediate use in improving advocacy strategies, positions and strengthening constituency; **Frequently able** to make estimates by combining multiple data sources

4

Regular collection, access, and organization of a variety of data, **either internally or through strong partnerships**, including anecdotal data from stakeholders, public data sets, opposition evidence and some original data sources; If done internally, organization has **dedicated** resources to **maintain** data and make it accessible for analysis, evaluation and other internal and external advocacy; If done through partnership, organization has dedicated resources to **systematically** access information and make it **accessible** for internal advocacy needs; **Very creative in making estimates** by combining multiple data sources; **May include** developing data that doesn't exist today in **advocacy agenda**

Skip this section & answer later



Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
26 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How much credibility have we established with others in the relevant fields?

Question
28

Question
29

Question
30

Question
31

Question
32

1 Organization **does not have a voice** in relevant discussions, either because it is not well-known, has a poor reputation, or is **not seen to represent** an important and influential group of constituents

2 Organization may be credible with a **limited set** of groups; **Has not gained trust broadly**; Others **rarely seek out** organization and/or individuals in the organization as a source of information; Organization finds it **challenging to have a voice** in relevant discussions and **rarely has a seat at the table**; **Some** perceive the organization as authentically connected to and representing an important and influential group of constituents

3 Organization is **well known** and its position on issues is **well-understood** by **many** relevant people and organizations; Others **sometimes** seek out organization and/or individuals in the organization as a source of information or insight; Organization **works** to participate substantively in relevant discussions, but is **not always included**; **Many** perceive the organization to be authentically connected to and represent an important and influential group of constituents

4 Organization is **well-known** and has a **well-understood** position on issues; Others **regularly** seek out organization and/or individuals in the organization as a source of information or insight; Organization **participates substantively** in relevant discussions and **is always granted a seat at the table**; **Organization often sought out as an authentic and authoritative source on the perspectives of their constituency**

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



▼ STRATEGY
13 of 13 questions answered

▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND
INNOVATION
15 of 15 questions answered

▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered

▲ ADVOCACY
27 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How proactively do we raise new issues and build momentum?

1

Organization does not identify ways to proactively **shape** public opinions and/or policy discussions (either independently or as part of a coalition); **All strategies are built around reacting** to existing conditions

2

Organization has identified ways to **shape** public opinions and/or policy discussions (either independently or as part of a coalition), but is **not able to execute**; **Most** strategies are built around reacting to existing conditions

Question
28

Question
29

Question
30

3

Organization has **demonstrated ability to shape** public opinions and/or policy discussions (either independently or as part of a coalition), **including raising new policy issues** and engaging in activities that **directly build momentum** toward advocacy objectives; **Sometimes engage appropriate partners or is asked to join** existing partnerships to drive advocacy objectives

4

Organization has a track record of shaping public opinions and/or policy discussions (either independently or as part of a coalition), including **raising new policy issues** and engaging in activities that directly build momentum toward advocacy objectives; **Regularly leads** or is asked to join partnerships that take on challenging advocacy objectives

Question
31

Question
32

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



- ▼ STRATEGY
13 of 13 questions answered ✓
- ▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered ✓
- ▼ FUNDING
11 of 11 questions answered ✓
- ▼ VALUES
7 of 7 questions answered ✓
- ▼ LEARNING AND
INNOVATION
15 of 15 questions answered ✓
- ▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered ✓

▲ ADVOCACY
28 of 44 questions answered ✓

Do we have a clear and compelling
theory of change for our advocacy
work? ○

Do we have an effective advocacy
planning process? ○

Are we well organized to pursue our
advocacy objectives? ○

Are we aware of the complete issue
landscape and key players? ○

Do we have a system of relationship
management? ○

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

Are we contributing new insights to advocacy issues where we can have the highest impact?

Question
28

1 Look to **other organizations and publications** for insight into advocacy issues due to lack of internal capabilities to develop own analysis and perspectives ○

2 **May be able** to internally develop a unique perspective on issues, but **not yet able to disseminate** to field ○

Question
29

3 **Share new** facts, motivations **and** insights on advocacy issues with field from **time to time**, but **not a consistent** thought leader in the field and **does not often develop insight internally** (through data analysis or aggregating individual field responses into national dialogue) but typically applies insights developed by other external groups and organizations ○

4 **Field looks to the** organization for **unique and original** analysis and **perspectives** on advocacy issues based on a **track record** of effectively using data and analysis or **aggregating individual field responses into national dialogue** to add **new** facts, motivations **and** insights to advocacy issues; Have a **systematic way to share** new insights ○

Question
30Question
31

○ Not Applicable

○ Do Not Know

Question
32[Skip this section & answer later](#)[Save progress & finish later](#)[Back](#)[Next](#)

- ▼ STRATEGY
13 of 13 questions answered ✓
- ▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered ✓
- ▼ FUNDING
11 of 11 questions answered ✓
- ▼ VALUES
7 of 7 questions answered ✓
- ▼ LEARNING AND
INNOVATION
15 of 15 questions answered ✓
- ▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered ✓

- ▲ ADVOCACY
29 of 44 questions answered ✓
- Do we have a clear and compelling theory of change for our advocacy work? ○
- Do we have an effective advocacy planning process? ○
- Are we well organized to pursue our advocacy objectives? ○
- Are we aware of the complete issue landscape and key players? ○
- Do we have a system of relationship ○

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How effective are we in mobilizing individuals or groups to take action in support of change?

Question
28Question
29Question
30Question
31Question
32

1

No attempt to build community among constituents or **mobilize constituents in support** of advocacy objectives; All advocacy work of organization is done directly by staff without engaging constituents to support

2

Reach out to constituents with requests to support advocacy objectives, though with **limited success**; **No attempt** to align individual and/or groups of constituents or constituents of policymakers with appropriate advocacy issues or provide tailored approaches to supporting advocacy objectives; May build **some sense of** community among constituents, though efforts are sporadic; **Unable to** measure strength of constituency or to provide opportunities to build capacity of constituents as a group

3

Often successful in mobilization of constituents, including aligning individual and/or groups of constituents with appropriate advocacy issues and **offering feasible approaches** to supporting advocacy objectives; **Able to leverage partnerships** to align individual groups of **related** constituents including constituents of policymakers; Sponsor **some** activities to **build community** among different groups of constituents for further empowerment; **Have good understanding** of strength of

4

Able to **access and mobilize** constituents in support of advocacy objectives **effectively by regularly aligning** individual and/or groups of constituents, including constituents of policymakers, with appropriate advocacy issues and **providing a range of straightforward ways** to support advocacy objectives (locally and nationally, as appropriate); **Readily and easily leverage partnerships** to bring additional individuals to support advocacy objective; **Regularly** work to build community among different groups of

Skip this section & answer later ?

Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
30 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How effective is the organization in proposing policy to advance advocacy objectives?

Question
28

1 Organization **does not engage in policy development** due to insufficient **knowledge or capabilities** or **lack of understanding** of process

2 **From time to time**, organization engages in policy development at **one or more levels** of government, but no processes to support such activity systematically; Organization is **unable to produce** draft policy beyond recommendations of issue framing

Question
29

Question
30

3 **Organization has a process** (based on **emerging** understanding) to engage in policy development (including **generally aligning** resources to different steps in the process) at **one or more** levels of government; Organization can **produce draft policy** (or participate in process through partnerships) that policymakers can react to; Draft policy **sometimes** supported by **analysis** and **materials that help policymakers** make proposals and drive change

4 **Organization has a systematic process** based on **deep knowledge** of policy development process (including **resources explicitly aligned** to different steps of the process) and a **track record** of executing it at **multiple** levels of government; Results in organization **producing draft policy** (or participate in process through partnerships) that is **action-ready** and supported by **analysis** and **materials that help policymakers** make proposals and drive change

Question
31

Question
32

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
31 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How well do we shape the implementation of policies to benefit our constituents?

Question
28

1

Organization **unable** to influence key elements of policy implementation (e.g., drafting of guidance, creation of supporting regulations, influence on implementation in regional or local spheres)

2

Organization **has some ability** to influence key elements of policy implementation, including drafting regulations and implementation guidance and influencing implementation

Question
29

3

Organization **generally effective** at influencing key elements of policy implementation, including drafting regulations and implementation guidance and influencing implementation

4

Organization **very effective** at influencing key elements of policy implementation, including drafting regulations and implementation guidance and influencing implementation

Question
30

☐

Not Applicable

☐

Do Not Know

Question
31

Question
32

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
32 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How well do we ensure our constituents benefit from existing policies?

Question
28

1 **Unable** to effectively translate changes in policy into tangible benefits for constituents (e.g., through clear articulation of what constituents can do differently or expect to change for the better)

2 **Sometimes able** to effectively turn changes in policy into tangible benefits for constituents by providing clear, simple, and specific communications and tools (if applicable) that enable constituents to realize benefits

Question
29

3 **Frequently able** to effectively translate changes in policy into tangible benefits for constituents by providing clear, simple, and specific communications and tools (if applicable) that enable constituents to realize benefits

4 **Seen as the authority in the field** for those wanting to understand the implications of new policy; **Consistently able** to effectively translate changes in policy into tangible benefits for constituents by providing clear, simple, and specific communications and tools (if applicable) that enable constituents to realize benefits

Question
30

Question
31

☐ Not Applicable

☐ Do Not Know

Question
32

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered



FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered

LEARNING AND
INNOVATION

15 of 15 questions answered

MARKETING AND
COMMUNICATION

6 of 6 questions answered



ADVOCACY

33 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?Do we have an effective advocacy
planning process?Are we well organized to pursue our
advocacy objectives?Are we aware of the complete issue
landscape and key players?Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy
objectives?Question
27How well do we apply the range of legally available strategies to
support our advocacy work?Question
28

1

Organization **not legally able** to undertake 501c(4) work, even where such activities are critical to advancing the vision; **Lacks understanding** of full range of permissible 501c(3) activities (e.g., some lobbying), resulting in missed opportunities for advocacy

2

Organization **legally able** to undertake 501c(4) work and/or has **some understanding** of full range of permissible 501c(3) activities; **Policies** to delineate c(4) activity from c(3) activities are **unclear and not well understood**; Ability to use c(4) tools is **rudimentary** (if able)

Question
29Question
30

3

Organization **legally able** to undertake 501c(4) work and/or has **solid understanding** of full range of permissible 501c(3) activities; **Policies** to delineate c(4) activity from c(3) activities are **clear and understood**; Ability to use c(4) tools is **solid** (if able)

4

Organization **legally able** to undertake 501c(4) work and/or has proven ability to leverage **the full range** of permissible 501c(3) activities to advance advocacy agenda as needed; **Policies** to delineate c(4) activity from c(3) activities are **clear, widely understood, and actively enforced**; Ability to use c(4) tools to drive change is **exceptional** (if applicable)

Question
31Question
32☐

Not Applicable

☐

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
34 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Are we able to effectively influence in service of our advocacy objectives?

Question
27

How well do we leverage legal strategies in support of advocacy?

1

Miss significant opportunities to advance agenda by solely supporting the legal efforts of others and/or failing to develop and use legal tools to advance goals

2

Support other organizations engaged in using legal tools (e.g. by serving as a plaintiff, providing information or testimony), though **no internal capacity** exists

Question
28

3

Some legal capabilities through **internal resources** or external partnerships to undertake lawsuits and leverage other legal tools with some record of success; Only **basic** understanding of limits and possibilities of legal tools for advancing agenda

4

Track record of effective legal capacity through internal resources to undertake lawsuits and **regularly** leverage other legal tools to advance organizational agenda, based on **deep** understanding of limits and possibilities of legal tools for advancing agenda

Question
29

Question
30

Not Applicable

Do Not Know

Question
31

Question
32

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY

13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS

43 of 43 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND
INNOVATION

15 of 15 questions answered

MARKETING AND
COMMUNICATION

6 of 6 questions answered

ADVOCACY

35 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?Do we have an effective advocacy
planning process?Are we well organized to pursue our
advocacy objectives?Are we aware of the complete issue
landscape and key players?Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we effectively communicate in service of our advocacy
objectives?Question
36

How compelling are our advocacy messages?

1

Advocacy messages are **vague and do not
appeal effectively** to key constituents and
stakeholders; Readability is of **variable
quality**; **Desired actions** for recipients are
unclear

2

Advocacy messages are **simple,
compelling, and have a reasonable level
of factual support**; Messages may be
singular in focus and include either
compelling **statistical or anecdotal
support** to support broad appeal; **Most**
communications include clear actions for
recipientsQuestion
37Question
38Question
39Question
40

3

Advocacy messages are **simple,
compelling, and supported and driven by
facts**; **More than one** framing/message
exists to broaden appeal; Messaging
includes either compelling **statistical or
anecdotal support** to support broad
appeal; **Most** communications include clear
actions for recipients

4

Advocacy messages are **simple,
compelling, and supported and driven by
facts**; Multiple framing/message exists to
appeal to multiple audiences; Messaging
includes both **statistical and anecdotal
support** to support broad appeal; **All**
communications include clear actions for
recipients

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
36 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we effectively communicate in service of our advocacy objectives?

Question
36

Do we effectively relate advocacy issues to broader issues of the day?

Question
37

1 Advocacy messages **rarely/never relate to broader issues**; Reach remains narrow

2 Advocacy messages **related to a handful of the most relevant** national issues to drive awareness and support

Question
38

3 Advocacy messages **related to most** relevant national issues to drive awareness and support

4 Advocacy messages **routinely related to a range of broader local/national issues** to drive awareness and support (e.g., relating testing categorization to broader NCLB debate)

Question
39

Not Applicable

Do Not Know

Question
40

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answeredLEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answeredFUNDING
11 of 11 questions answeredVALUES
7 of 7 questions answeredLEARNING AND
INNOVATION
15 of 15 questions answeredMARKETING AND
COMMUNICATION
6 of 6 questions answeredADVOCACY
37 of 44 questions answeredDo we have a clear and compelling
theory of change for our advocacy
work?Do we have an effective advocacy
planning process?Are we well organized to pursue our
advocacy objectives?Are we aware of the complete issue
landscape and key players?Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we effectively communicate in service of our advocacy
objectives?Question
36Do we use a diversity of communications methods as appropriate to
realize our strategy and objectives?Question
37

1

One or two primary communications methods are used; Tools deployed typically based on current **capabilities and habits**; **Significant gaps** exist in message reach given narrow set of communication methods

2

Two or more primary communications methods are used; Methods ensure connection with the **highest priority** constituents and stakeholders; **Some gaps** exist in message reach given narrow set of communication methods; Method selection include basic understanding of constituent and stakeholder comfort with various communication channels

Question
38Question
39

3

Broad range of communications methods are used; Methods ensure connection with **all high priority** constituents and stakeholders; **Minimal gaps** exist in messages; Method selection includes **strong understanding** of constituent and stakeholder comfort with various communication channels

4

Broad range of communications methods are used (e.g., social media, radio interviews, op/ed placements, direct community outreach); Tools deployed **are deliberately chosen to have the desired impact on specifically identified constituents and stakeholders**; Tools are **regularly added and adjusted** to address any identified gaps

Question
40☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
38 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we effectively communicate in service of our advocacy objectives?

Question
36

How effectively do we use media to advance advocacy objectives?

1

Rarely access any type of media in a way
that reaches meaningful audiences

2

Have **sporadic** and/or **singular** ways of
accessing media (i.e., limiting to
newspapers, posting online messages only
occasionally), but do not reach meaningful
audiences; **Use of media is not targeted**
based on **knowledge** of audience

Question
37

Question
38

3

Use and access **a few different** types of
media (e.g., mainstream, ethnic, online,
social, written) to reach **a few** audiences
(e.g., mainstream, ethnic, groups,
individuals); Organization **sometimes**
adjusts for each media push based on
general, but not data-based, sense of
audience needs and interests

4

Regularly use and access **multiple** types of
media to reach **multiple** audiences; Tactics
are tailored for each media push based on
deep understanding of the audience to be
reached, including **ethnic media with**
translated and tailored messaging,
online viral pushes and access to
mainstream media when appropriate

Question
39

Question
40

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
39 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Do we effectively communicate in service of our advocacy objectives?

Question
36

How well do our constituent outreach lists amplify our advocacy reach and effectiveness?

Question
37

1 Outreach **data is stored in a rudimentary form** (e.g., housed in an Excel spreadsheet that is rarely updated and hard to access); **Significant gaps** may exist; **No understanding** of frequency or quality of engagement

2 Outreach **data is sufficient though not always complete and is updated** when needed, **data may take time to compile due to not being well-integrated and/or in an immediately usable form**; **Basic understanding** of frequency of engagement

Question
38

Question
39

Question
40

3 **Easily accessible, usable, comprehensive data** for outreach however, data may exist in different forms and may take **time to integrate**; Recipient information is **regularly updated and easy to use and access by multiple users in the organization**; Recipients identified as **targets for different types** of potential outreach (e.g., fundraising, vs. follow-on outreach, vs. awareness); **Solid understanding of frequency** of engagement with **some information on quality** of engagement

4 **Easily accessible, usable and complete** (e.g. full contact information, including email, address, zip code, congressional district) **single database** for outreach; Database include past actions (e.g., donations, event attendance); Recipient information is **constantly up-to-date and easy to use and access by multiple users in the organization**; Recipients not only identified as **targets for different types** of potential outreach (e.g., fundraising, vs. follow-on outreach, vs. awareness) but are also prioritized by what is expected; **Deep understanding of frequency and quality** of engagement over time

Do Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
40 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Can we support our organizational objectives through policy and advocacy work?

Question
41

Are we able to influence policy?

1

Organization does **not have ability** or is **unaware** of possibilities for influencing policy-making; Never called in on substantive policy discussions

2

Organization is **aware of its** possibilities in influencing policy-making; **Some readiness and skill** to participate in policy discussion, but **rarely invited** to substantive policy discussions

Question
42

Question
43

3

Organization is fully **aware of its possibilities** in influencing policy-making and is **one of several** organizations **active** in policy-discussions on local, state or national level

4

Organization **pro-actively and reactively influences** policymaking, in a **highly effective, sustainable** manner, on local, state and national levels; **Always ready for and often called on** to participate in substantive policy discussion and at times **initiates** discussions

Question
44

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later

Back

Next

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
41 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Can we support our organizational objectives through policy and advocacy work?

Question
41

How effective are we at understanding policy and its potential impact on constituents?

Question
42

1
☐ Organization has **difficulty characterizing** emerging policy and assessing impact of policy due to lack of internal analysis capabilities and/or effective **integration of** external analysis into organizational understanding; **Generally overwhelmed** by the amount of information on policy or **do not know how to apply this data**

2
☐ Organization operates with basic assumptions of policy when it emerges; Only generally understand how policy will impact various stakeholder communities; Struggle to conduct analysis internally and/or effectively integrate external analysis into organizational understanding

Question
43

Question
44

3
☐ Organization works to characterize emerging policy correctly, but is not always able to do so; Generally understand how policy will impact stakeholder communities; Conducts analysis internally and/or integrates external analysis into organizational understanding somewhat effectively, but not systematically

4
☐ Organization has a track record of correctly characterizing emerging policy; May be sought out by others for policy analysis; Able to accurately assess how policy will impact various stakeholder communities; Conducts analysis internally and/or effectively and systematically integrates external analysis into organizational conclusions

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

STRATEGY
13 of 13 questions answered

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
42 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Can we support our organizational objectives through policy and advocacy work?

Question
41

Are we able to build effective partnerships and alliances?

1

Limited use of partnerships and alliances
within public sector, nonprofit or for-profit
entities

2

Early stages of building relationships and
collaborating with other public sector,
nonprofit or for-profit entities

Question
42

Question
43

Question
44

3

Effectively built and leveraged some key
relationships with few types of relevant
parties (e.g. public sector, nonprofit or
for-profit entities) that have yielded some
results for organization; Some relations may
be precarious or not fully "win-win"

4

Built, leveraged, and maintained strong,
relationships with variety of relevant parties
(e.g. local, state, and federal government
entities as well as for-profit, other nonprofit,
and community agencies) that have a track
record of high-impact on organizational
objectives; Relationships deeply anchored in
stable, long-term, mutually beneficial
collaboration

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst
your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



▼ STRATEGY
13 of 13 questions answered

▼ LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND
INNOVATION
15 of 15 questions answered

▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered

▲ ADVOCACY
43 of 44 questions answered

Do we have a clear and compelling
theory of change for our advocacy
work?

Do we have an effective advocacy
planning process?

Are we well organized to pursue our
advocacy objectives?

Are we aware of the complete issue
landscape and key players?

Do we have a system of relationship
management?

NAVIGATION

ADVOCACY

Can we support our organizational objectives through policy and advocacy work?

Question
41

How well do we know and understand the realities of the individuals or groups we are working to benefit?

Question
42

1 Few individuals in the organization have a sense of constituents, and **disagreement** may exist about who they are

2 Organization has a **general definition of constituents** and **some understanding of their situations**, challenges, and day-to-day experiences; **Many** in the organization have **direct exposure** to constituents and their needs

Question
43

3 Organization has a **deep understanding** of the constituents it is working to benefit and their situations, challenges, and day-to-day experiences; **Almost all staff have direct experience** working with constituents. Constituents may serve on board or act in advisory role

4 Organization has a **deep understanding** of the constituents it is working to benefit and their situations, challenges, and day-to-day experiences; **Almost all staff regularly work** with constituents; Constituent priorities and needs are **regularly reviewed and revised** based on constituent input, Constituents serve on board, are part of the organization's staff or act in an advisory role

Question
44

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
0 of 15 questions answered

Do we have standardized processes that
enable our work?

How well do we protect the organization
against different types of risks?

Are our programs adequately staffed and
resourced?

Do we have the systems in place to
execute our programs effectively?

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

Do we have standardized processes that enable our work?

Question
1

Do we have an operational plan mapped to our core mission and a process for adjusting this plan over time?

Question
2

1 Organization **runs operations purely on day-to-day basis** with no short- or longer-term planning activities; **No experience** in operational planning

2 **Some** ability and tendency to develop high-level operational plan either internally or via external assistance; Operational plan **loosely or not** linked to strategic planning activities and used **roughly** to guide operations

Question
3

3 **Ability and tendency** to develop and refine **concrete, realistic** operational plan; **Some internal** expertise in operational planning or **access to relevant** external assistance; Operational planning carried out on a **near regular** basis; Operational plan **linked** to strategic planning activities and **used to guide** operations

4 **Develops and refines concrete, realistic, and detailed** operational plan; Has **critical mass of internal** expertise in operational planning, **or efficiently uses external**, sustainable, highly qualified resources; Operational planning exercise carried out **regularly**; Operational plan **tightly linked** to strategic planning activities and **systematically** used to **direct** operations

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst

Skip this section & answer later



Save progress & finish later

← Back

Next →

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

6 of 6 questions answered

ADVOCACY

44 of 44 questions answered

MANAGING PROCESSES

1 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

MANAGING PROCESSES

Do we have standardized processes that enable our work?

Question 1

Do we have processes that improve how our organization functions?

1

Limited set of processes (e.g., decision making, planning, reviews) for **ensuring effective functioning** of the organization; **Use of processes is variable**, or processes are seen as ad hoc requirements ("paperwork exercises"); **No monitoring** or assessment of processes

2

Basic set of processes in core areas for ensuring efficient functioning of organization; Processes known, used and truly accepted by **only portion of staff**; **Limited monitoring and assessment** of processes, with few improvements made in consequence

3

Solid, well designed set of processes in place in core areas to ensure smooth, effective functioning of organization; Processes **known and accepted by many**, often **used and contribute to increased impact**; **Occasional monitoring and assessment** of processes, with some improvements made

4

Robust, lean, and well-designed set of processes (e.g., decision making, planning, reviews) in place in all areas to ensure effective and efficient functioning of organization; Processes are **widely known, used and accepted**, and are key to ensuring full impact of organization; **Continual monitoring and assessment** of processes, and **systematic improvement** made

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst

Skip this section & answer later

?

Save progress & finish later

Back

Next

9.2

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

6 of 6 questions answered

ADVOCACY

44 of 44 questions answered

MANAGING PROCESSES

2 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

MANAGING PROCESSES

Do we have standardized processes that enable our work?

Question 1

Do we have processes that enable informed and efficient decision-making?

Question 2

1

Decisions made largely on an **ad hoc** basis by one person and/or whomever is accessible; Highly **informal**

2

Appropriate decision makers **known**; Decision-making process fairly well established and process is **generally** followed, but **often** breaks down and **becomes informal**

Question 3

3

Clear, largely formal lines/systems for decision making but decisions are **not always** appropriately **implemented** or followed; Dissemination of decisions **generally good** but consistency and quality could be **improved**

4

Clear, formal lines/systems for decision making that are **consistently** implemented and involve as **broad of participation** as is practical and appropriate along with **quality, consistent** dissemination/interpretation of decision

Not Applicable

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later

?

Save progress & finish later

Back

Next

9.3

javascript:void(0);

▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND
INNOVATION
15 of 15 questions answered

▼ MARKETING AND
COMMUNICATION
6 of 6 questions answered

▼ ADVOCACY
44 of 44 questions answered

▲ MANAGING PROCESSES
3 of 15 questions answered

Do we have standardized processes
that enable our work?

How well do we protect the organization
against different types of risks?

Are our programs adequately staffed and
resourced?

Do we have the systems in place to
execute our programs effectively?

▼ ORGANIZATION
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question
4

Do we comply with relevant regulations?

1

Organization **does not** complete or file taxes in an efficient and timely manner; **Concerning gaps** exist in adherence to all regulations regarding board and staff (e.g., required number of board members and offices, proper paperwork and payroll procedures in place); Required proof of compliance **may be incomplete** and **no formal procedures** exist to ensure compliance

2

Organization completes and files taxes in an **efficient and timely manner**; Organization **adheres to all regulations** regarding board and staff (e.g., required number of board members and offices, proper paperwork and payroll procedures in place); Required proof of compliance **usually kept on-hand for the required duration** of time though **no formal procedures** exist to ensure compliance

Question
5

Question
6

Question
7

Question
8

Question
9

3

Organization completes and files taxes in an **efficient and timely manner** with the endorsement of an **external expert** (e.g., accountant or accounting firm); Organization **adheres to all regulations** regarding board and staff (e.g., required number of board members and offices, proper paperwork and payroll procedures in place); Required proof of compliance **typically kept on-hand for the required duration** of time though **few formal procedures** exist to ensure compliance

4

Organization completes and files taxes in an **efficient and timely manner** with the endorsement of an **external expert** (e.g., accountant or accounting firm); Organization **rigorously adheres to all regulations** regarding board and staff (e.g., required number of board members and offices, proper paperwork and payroll procedures in place); Required proof of compliance **kept on-hand for the required duration** of time

☐

Not Applicable

☐

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
4 of 15 questions answered

Do we have standardized processes
that enable our work?

How well do we protect the organization
against different types of risks?

Are our programs adequately staffed and
resourced?

Do we have the systems in place to
execute our programs effectively?

ORGANIZATION
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question
4

Do we have appropriate legal expertise and support?

1

Organization **does not anticipate legal issues**, but finds help and addresses issues individually when they arise; **Property insurance** includes liability component

2

Legal support resources **identified, readily available, and employed on "as needed"** basis; Major liability exposures **managed and insured** (including property liability and workers' compensation)

Question
5

Question
6

3

Legal support **regularly available and consulted** in planning; **Routine** legal risk management and **occasional** review of insurance

4

Well-developed, effective, and efficient internal legal infrastructure appropriate for day-to-day legal work; **Additional access to general and specialized** external expertise to cover peaks and extraordinary cases; **Continuous** legal risk management and **regular** adjustment of insurance

Question
7

Question
8

Question
9

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later

Back

Next

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
5 of 15 questions answered

Do we have standardized processes
that enable our work?

How well do we protect the organization
against different types of risks?

Are our programs adequately staffed and
resourced?

Do we have the systems in place to
execute our programs effectively?

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question
4

Do we have financial controls in place?

Question
5

1

Few policies exist or are weak (e.g., many personnel have free access to organization's funds with no process for authorization)

2

Policies exist including only CEO/ED, Treasurer and other essential personnel have access to bank account; Board approval required for bank access and signing authority; Holes still exist (e.g., expense policies exist, but without accountability)

Question
6

Question
7

Question
8

Question
9

3

System of financial controls is in place, but **has not been verified** externally; **Includes most of the following:** only CEO/ED, Treasurer and other essential personnel have access to bank account; Board approval is required for bank access and signing authority, as well as expenditures over a fixed amount; Clear expense accountability policies are in place

4

System of financial controls that has been **verified externally to be strong and comprehensive** is in place, **including all of the following:** only CEO/ED, Treasurer and other essential personnel have access to bank account; Board approval is required for bank access and signing authority, as well as expenditures over a fixed amount; Clear expense accountability policies are in place

Not Applicable

Do Not Know

Skip this section & answer later



Save progress & finish later

← Back

Next →

▼ FUNDING
11 of 11 questions answered ✓

▼ VALUES
7 of 7 questions answered ✓

▼ LEARNING AND INNOVATION
15 of 15 questions answered ✓

▼ MARKETING AND COMMUNICATION
6 of 6 questions answered ✓

▼ ADVOCACY
44 of 44 questions answered ✓

▲ MANAGING PROCESSES
6 of 15 questions answered ✓

Do we have standardized processes that enable our work? ○

How well do we protect the organization against different types of risks? ○

Are our programs adequately staffed and resourced? ○

Do we have the systems in place to execute our programs effectively? ○

▼ ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question
4

Have we specified our human resource policies?

1

Organization **does not have the capacity or policies**, formal or informal, in place to deal with **workplace challenges** (e.g., sexual harassment, discrimination), exposing the organization to significant risk

2

Organization has some policies but they are not well-documented, shared with or understood **by all employees**

Question
5

Question
6

3

Organization has **well-documented policies covering a range of HR issues** that are proactively **shared with all employees**, **readily accessible** and are **consistently followed** by the organization

4

Organization has **well-documented policies covering a range of HR issues** that are **proactively shared with all employees**, **readily accessible** and are **consistently followed** by the organization; **Resources exist** for employees seeking advice or counsel in challenging situations

Question
7

Question
8

Question
9

Not Applicable

Do Not Know

Do Not Know

Skip this section & answer later



Save progress & finish later

← Back

Next →

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

6 of 6 questions answered

ADVOCACY

44 of 44 questions answered

MANAGING PROCESSES

7 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question 4

Do we protect our reputation?

1

Minimal understanding of risks to reputation; Individuals/divisions may inadvertently act in ways that negatively impact reputation (e.g., partnering with a controversial group or writing an editorial)

2

Employees with visible public roles are versed in potential risks to the organization; General guidance exists around the types of actions the organization will take, points of view it will endorse, and partners with which it will associate, though guidance may be vague and open to interpretation; Organization may be too risk averse or take unreasonable risks

3

Most employees, especially those with visible public roles, are well versed in potential risks to the organization; General guidance exists for the types of actions the organization will take, points of view it will endorse, and partners with which it will associate; Organization may be too risk averse or take unreasonable risks; Common understanding of types of decisions for which CEO/ED approval should be sought

4

All employees are well versed in potential risks to the organization; Clear guidance exists for the types of actions it will take, points of view it will endorse and partners with which it will associate; Risks are weighed against benefits to constituents thoughtfully and consistently; Clear processes exist (and may require Board approval) for actions that may put the reputation at risk

Not Applicable

Do Not Know

Skip this section & answer later

Save progress & finish later

Back

Next

- FUNDING
11 of 11 questions answered
- VALUES
7 of 7 questions answered
- LEARNING AND INNOVATION
15 of 15 questions answered
- MARKETING AND COMMUNICATION
6 of 6 questions answered
- ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES

8 of 15 questions answered

- Do we have standardized processes that enable our work?
- How well do we protect the organization against different types of risks?
- Are our programs adequately staffed and resourced?
- Do we have the systems in place to execute our programs effectively?

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question 4

Do we have appropriate level of insurance to protect ourselves?

1

Organization **lacks** Directors and Officers insurance, property insurance (e.g., for buildings, IT equipment), and other insurance if needed (e.g., travel insurance for those traveling to high-risk locations)

2

Organization **has some level of** Directors and Officers insurance, property insurance (e.g., for buildings, IT equipment), and other insurance if needed (e.g., travel insurance for those traveling to high-risk locations), though **significant gaps** exist

Question 5

Question 6

3

Organization **has some level of** Directors and Officers insurance, property insurance (e.g., for buildings, IT equipment), and other insurance if needed (e.g., travel insurance for those traveling to high-risk locations); **Few gaps** exist; Insurance needs **rarely revisited**

4

Organization **has needed levels of** Directors and Officers insurance, property insurance (e.g., for buildings, IT equipment), **and other insurance if needed** (e.g., travel insurance for those traveling to high-risk locations); Insurance needs **regularly revisited** and adjustments made as needed

Question 7

Question 8

Question 9

☐

Not Applicable

☐

Do Not Know

Skip this section & answer later



Save progress & finish later



Back

Next



▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND INNOVATION
15 of 15 questions answered

▼ MARKETING AND COMMUNICATION
6 of 6 questions answered

▼ ADVOCACY
44 of 44 questions answered

▲ MANAGING PROCESSES
9 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

▼ ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

How well do we protect the organization against different types of risks?

Question 4

Are our data and files backed up, secure and accessible?

1

No backup systems exist; Most information exists in hardcopy or stored on a hard-drives, so information is **generally insecure** and **inappropriately accessible**

2

Some backup systems exist; Important files and data is backed-up offsite, though not regularly, so that they are only **partially secure**; **Some** important information still in paper files and information is **not always accessible**

Question 5

Question 6

3

Backup systems exist; Important files and data are backed-up offsite, though infrequently, so that they are **generally secure**; **Some** important information still in paper files and is **mostly, but not always, appropriately accessible**

4

High-quality backup systems exist including **regular and automatic off-site backup of data and files**, as well as **day-to-day** operating information so that it is **highly secure**; **All critical information** exists electronically and is **appropriately accessible**

Question 7

Question 8

Question 9

Not Applicable

Do Not Know

Skip this section & answer later

?

Save progress & finish later

←

Back

Next →

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-133 Days left

Logout

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
15 of 15 questions answered

MARKETING AND COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
10 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

MANAGING PROCESSES
How well do we protect the organization against different types of risks?

Question 4
Do we have a plan for catastrophes?

1
Organization **has not discussed** plans for worst-case scenarios (e.g., natural disaster)

2
Organization has a **plan to decide and communicate** if personnel should or should not report to work in a disaster situation; basic procedures exist **for accounting for all personnel**

Question 5

3
Organization has a **clear plan for continued operations (if critical) or next steps** in a disaster scenario; Procedures exist **for accounting for all personnel and maintaining communication**, especially amongst senior team

4
Organization has a **clear plan for continued operations (if critical) or next steps** in a disaster scenario; Procedures exist **for accounting for all personnel and maintaining communication**, across the organization, if traditional communications are disrupted

Question 6

Not Applicable

Do Not Know

Question 7

Question 8

Question 9

Skip this section & answer later

Save progress & finish later

Back

Next

9.11

javascriptvoid(0);

▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND INNOVATION
15 of 15 questions answered

▼ MARKETING AND COMMUNICATION
6 of 6 questions answered

▼ ADVOCACY
44 of 44 questions answered

▲ MANAGING PROCESSES
11 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

▼ ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

Are our programs adequately staffed and resourced?

Question
12

Do we have the right people and resources (e.g., program budget) to run our programs?

1

Number and skills of staff insufficient to operate programs effectively

2

Staffing levels for programs are **inconsistent** (either too lean or over staffed); Staff skill sets are **generally aligned** with the program needs, but often need more training or guidance

3

Most programs have an **adequate** number of staff; staff skill sets are **well aligned** with the program needs; **Programs struggle to adjust as staffing needs shift** over time

4

All programs have **adequate** number of dedicated staff; The staff skill sets are **highly aligned** with the program needs and **gaps are filled** through improved hiring or training; Programs plan staffing levels effectively and **readily adjust** to changing needs

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Skip this section & answer later



Save progress & finish later



Back

Next



▼ FUNDING
11 of 11 questions answered

▼ VALUES
7 of 7 questions answered

▼ LEARNING AND INNOVATION
15 of 15 questions answered

▼ MARKETING AND COMMUNICATION
6 of 6 questions answered

▼ ADVOCACY
44 of 44 questions answered

▲ MANAGING PROCESSES
12 of 15 questions answered

Do we have standardized processes that enable our work?

How well do we protect the organization against different types of risks?

Are our programs adequately staffed and resourced?

Do we have the systems in place to execute our programs effectively?

▼ ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

Do we have the systems in place to execute our programs effectively?

Question
13

Do we plan appropriately such that programs are well-executed?

1 Programs launched with basic timelines and budgets, but are not detailed or informed enough to guide execution; Organization unaware of risks

2 Programs have **basic** timelines and budgets, but are **not detailed, syndicated or iterated** on; Possible **risks to execution vaguely known**; Timelines and budgets are only **marginally helpful** during program execution

Question
14

Question
15

3 All programs **consistently** have a **planning process** that includes **detailed and iterative** timelines and budgets with **risks of both identified** in advance; Timelines and budgets are often **directionally correct, but need constant updating during program execution**

4 All programs **consistently** have a **rigorous planning process** that includes **detailed, syndicated and iterative** timelines, budgets and scenario plans that **account for range of** realistic risks to program execution; Timelines and budgets have a solid **track record of being accurate** with only normal amounts of iteration as program is executed

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later

← Back

Next →

9.13

javascript:void(0);

▼ FUNDING
11 of 11 questions answered ✓

▼ VALUES
7 of 7 questions answered ✓

▼ LEARNING AND INNOVATION
15 of 15 questions answered ✓

▼ MARKETING AND COMMUNICATION
6 of 6 questions answered ✓

▼ ADVOCACY
44 of 44 questions answered ✓

▲ MANAGING PROCESSES
13 of 15 questions answered ✓

Do we have standardized processes that enable our work? ☐

How well do we protect the organization against different types of risks? ☐

Are our programs adequately staffed and resourced? ☐

Do we have the systems in place to execute our programs effectively? ☐

▼ ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

Do we have the systems in place to execute our programs effectively?

Question 13

Do we manage individual project and overall project portfolio performance?

Question 14

1 ☐ **Limited tracking** of performance with most evaluation based on anecdotal evidence; **Some data** on program activities and outputs is collected (e.g., number of children served) but without connection to **social impact** (measurement of social outcomes, e.g., drop-out rate lowered)

2 ☐ **Each program's performance is tracked** according to a general set of metrics; Organization regularly collects data on program activities and outputs (e.g., number of children served) but **lacks** connection to **social impact** (measurement of social outcomes, e.g., drop-out rate lowered)

Question 15

3 ☐ **Each program's performance progress is tracked** considering **social impact and costs**; performance indicators in place to judge interim progress; **Social impact measured**, but lacks control group, longitudinal (i.e., long-term) or third-party nature of evaluation is missing

4 ☐ **Each program** has a **robust set of agreed-upon goals** with corresponding targets that **shape program design** and activities; **Additional metrics** – including impact, process, and cost items – are in place; **Social impact measures** include control group, longitudinal (i.e., long-term) or third-party input

☐ Not Applicable

☐ Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



9.14

javascript:void(0);

FUNDING

11 of 11 questions answered



VALUES

7 of 7 questions answered



LEARNING AND INNOVATION

15 of 15 questions answered



MARKETING AND COMMUNICATION

6 of 6 questions answered



ADVOCACY

44 of 44 questions answered



MANAGING PROCESSES

14 of 15 questions answered



Do we have standardized processes that enable our work?



How well do we protect the organization against different types of risks?



Are our programs adequately staffed and resourced?



Do we have the systems in place to execute our programs effectively?



ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

NAVIGATION

MANAGING PROCESSES

Do we have the systems in place to execute our programs effectively?

Question 13

Are we able to adjust and make substantive improvements after project kick-offs?

Question 14

1 External performance comparisons made **only anecdotally** and internal performance data **rarely used**; Little data to use for program improvement

2 **Sporadically assess** how program activities rate against any existing internal or identified external benchmarks; **May** identify **improvement opportunities** or **try** to make **programmatic adjustments** and **improvements**, but rarely **successful**

Question 15

3 **Regularly, but infrequently assess** how program activities rate against internal or external benchmarks; **Work to**, but **only sometimes** successful at, identifying **improvement opportunities** based on **data** and then making **programmatic adjustments and improvements**

4 **High awareness** of how program activities rate against internal and external **best-in-class** benchmarks; **Systematic** practice of identifying **improvement opportunities** based on **data** and then making **programmatic adjustments and improvements**

Not Applicable

Do Not Know

Want to leave a comment?

Skip this section & answer later



Save progress & finish later



Back

Next



McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013

-133 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS

43 of 43 questions answered

FUNDING

11 of 11 questions answered

VALUES

7 of 7 questions answered

LEARNING AND INNOVATION

15 of 15 questions answered

MARKETING AND COMMUNICATION

6 of 6 questions answered

ADVOCACY

44 of 44 questions answered

MANAGING PROCESSES

15 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

0 of 9 questions answered

Does our organization's design facilitate the work we do?

Do we have sufficient infrastructure in place?

Do we have technology that enables our work?

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Does our organization's design facilitate the work we do?

Question 1

Do we design positions in such a way that employees feel empowered to drive results?

Question 2

1

Individual roles are poorly designed with significant gaps or overlap; Job descriptions do not exist or are outdated; Some key functions (e.g., CFO, HR) do not have a clear owner, reporting structure is not clear

2

Most core roles are clearly defined, with minimal gaps or overlap; Basic job descriptions exist; Most key functions have the appropriate level of dedicated staff, reporting structure is somewhat clear

Question 3

3

Most core roles are clearly defined, with minimal gaps or overlap; Job descriptions are specific and include expected deliverables; All key functions have appropriate level of dedicated staff, reporting structure is clear

4

All individuals have clearly defined roles, clearly articulated in job descriptions, with minimal gaps or overlap that describe specific deliverables; All functions have appropriate level of dedicated staff, reporting structure is clear and appropriately flexible

Not Applicable

Do Not Know

Want to leave a comment?


Type your anonymous question or comment about this topic for discussion amongst your organization here

Save progress & finish later

Back

Next


10.1

LEADERSHIP, STAFF
AND VOLUNTEERS 
43 of 43 questions answered


FUNDING 
11 of 11 questions answered

VALUES 
7 of 7 questions answered


LEARNING AND
INNOVATION 
15 of 15 questions answered

MARKETING AND
COMMUNICATION 
6 of 6 questions answered

ADVOCACY 
44 of 44 questions answered

MANAGING PROCESSES 
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY 
1 of 9 questions answered

Does our organization's design
facilitate the work we do? 

Do we have sufficient infrastructure in
place?

Do we have technology that enables our
work?

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Does our organization's design facilitate the work we do?

Question

1

Is our structure purposefully designed and well-documented?

1

Organizational entities (e.g., headquarters, regional and local offices) **are not well thought out**, and roles and responsibilities of entities are **neither formalized nor clear**; **No** organization chart exists

2

Some organizational entities are clearly defined, others are not; **Most roles and responsibilities of organizational entities are formalized** but may not reflect organizational realities; **Organization chart is incomplete** and may be outdated

Question

2

Question

3

3

Organizational entities **are clearly defined**; **All roles and responsibilities** of organizational entities are formalized but do not necessarily reflect organizational realities; **Organization chart is complete** but may be **outdated**

4

Roles and responsibilities of all organizational entities (e.g., headquarters, regional and local entities) are formalized, clear and complement each other; Organization chart is **complete and reflects current reality**

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

[Save progress & finish later](#)[Back](#)[Next](#)

McKinsey&Company

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL

DEADLINE OCTOBER 31, 2013
-133 Days left

Logout

LEADERSHIP, STAFF AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND INNOVATION
15 of 15 questions answered

MARKETING AND COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
15 of 15 questions answered

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY
2 of 9 questions answered

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Does our organization's design facilitate the work we do?

Question 1

Do we communicate and coordinate across the organization?

1

Different programs and organizational units **function in silos** with **little or dysfunctional coordination** between them

☐

2

Interactions between different programs and organizational units are **generally good**, though **coordination issues** do exist; **Some pooling** of resources

☐

3

All programs and units **function together effectively** with sharing of information and resources; **Few** coordination issues

☐

4

Constant and **seamless integration** between different programs and organizational units with few coordination issues; **Relationships are driven by organizational needs** (rather than hierarchy or politics)

☐

Not Applicable

☐

Do Not Know

☐

Question 2

Question 3

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst your organization here

Save progress & finish later

Back

Next

Does our organization's design facilitate the work we do?

Do we have sufficient infrastructure in place?

Do we have technology that enables our work?

10.3

javascript:void(0);

LEADERSHIP, STAFF
AND VOLUNTEERS 
43 of 43 questions answered


FUNDING 
11 of 11 questions answered

VALUES 
7 of 7 questions answered


LEARNING AND
INNOVATION 
15 of 15 questions answered

MARKETING AND
COMMUNICATION 
6 of 6 questions answered

ADVOCACY 
44 of 44 questions answered

MANAGING PROCESSES 
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY 
3 of 9 questions answered

Does our organization's design
facilitate the work we do? 

Do we have sufficient infrastructure in
place?

Do we have technology that enables our
work?

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have sufficient infrastructure in place?

Question
4

Do our buildings and office space match our needs?

1

Inadequate physical infrastructure, resulting in loss of effectiveness and efficiency (e.g., unfavorable locations for clients and employees, insufficient workspace for individuals, no space for teamwork)

2

Physical infrastructure **can be made to work well enough** to suit organization's most important and immediate needs; A number of **improvements could greatly help** increase effectiveness and efficiency (e.g., no good office space for teamwork, no possibility of holding confidential discussions, employees share desks)

3

Fully adequate physical infrastructure for the **current needs** of the organization; Infrastructure **does not impede** effectiveness and efficiency (e.g., favorable locations for clients and employees, sufficient individual and team office space, possibility for confidential discussions)

4

Physical infrastructure **well tailored** to organization's **current and anticipated** future needs; Well-designed and thought-out to **enhance** organization's efficiency and effectiveness (e.g., especially favorable locations for clients and employees, plentiful team office space encourages teamwork, layout increases critical interactions among staff)

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?

Type your anonymous question or comment about this topic for discussion amongst

Save progress & finish later

 BackNext 

LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
4 of 9 questions answered

Does our organization's design
facilitate the work we do?

Do we have sufficient infrastructure in
place?

Do we have technology that enables our
work?

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have technology that enables our work?

Question
5

Do we have the right technology to manage finances?

1

Financial system is **paper-based**;
**Significant data entry required for
analytic purposes** making any analysis
difficult and infrequent

2

Hardware and software in place allow for
enable financial management (e.g., basic
software package); **Manual transfer** of data
for other purposes (e.g., tax preparation,
organizational dashboards, payroll, etc.) is
difficult

Question
6Question
7Question
8Question
9

3

**Sufficient hardware and software in
place** to enable financial management (e.g.,
nationally-regarded software package);
Manual transfer of data for other purposes
(e.g., tax preparation, organizational
dashboards, payroll, etc.) is relatively easy

4

**Sophisticated hardware and software in
place** to enable financial management (e.g.,
nationally-regarded software package)
integrated with other related systems
(e.g., tax preparation, organizational
dashboards, payroll, etc.)

☐

Not Applicable

☐

Do Not Know

Want to leave a comment?


Save progress & finish later




Back

Next




LEADERSHIP, STAFF
AND VOLUNTEERS 
43 of 43 questions answered

FUNDING 
11 of 11 questions answered

VALUES 
7 of 7 questions answered


LEARNING AND
INNOVATION 
15 of 15 questions answered

MARKETING AND
COMMUNICATION 
6 of 6 questions answered


ADVOCACY 
44 of 44 questions answered

MANAGING PROCESSES 
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY 
5 of 9 questions answered

Does our organization's design
facilitate the work we do? 

Do we have sufficient infrastructure in
place? 

Do we have technology that enables
our work? 

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have technology that enables our work?

Question
5

Do our IT systems enable and advance our work?

1

Limited availability of IT appropriate for organization and/or difficulty getting support to solve IT problems; IT issues generally hinder efficiency and effectiveness of staff

2

Solidly equipped at highest levels of organization, but **incomplete/ limited infrastructure** at locations aside from central offices; Variable level of IT support across organization; Staff efficiency could be improved with better IT infrastructure

Question
6Question
7

3

Solid hardware and software infrastructure appropriate for organization accessible by all staff, but **not necessarily** with best technological options; IT challenges **generally** solved quickly, but **not consistent**; IT **generally** contributes to increased efficiency

4


As appropriate for organization, the **highest quality and quantity** of computer hardware, software, networking, connection speed and smart phone or mobile phone available to all staff; IT problems are solved quickly; Consistently effective and essential in increasing staff efficiency

Question
8Question
9☐ Not Applicable☐ Do Not Know

Want to leave a comment?


Save progress & finish later

 BackNext 

LEADERSHIP, STAFF
AND VOLUNTEERS 
43 of 43 questions answered


FUNDING 
11 of 11 questions answered


VALUES 
7 of 7 questions answered


LEARNING AND
INNOVATION 
15 of 15 questions answered

MARKETING AND
COMMUNICATION 
6 of 6 questions answered


ADVOCACY 
44 of 44 questions answered

MANAGING PROCESSES 
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY 
6 of 9 questions answered

Does our organization's design
facilitate the work we do? 

Do we have sufficient infrastructure in
place? 

Do we have technology that enables
our work? 

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have technology that enables our work?

Question
5

Do we have a website?

1

Organization has **no** individual website

2

Basic website containing **general information**, but little information on current developments; Site **maintenance is a burden** and performed **only occasionally**Question
6Question
7

3

Comprehensive website containing **basic information** on organization as well as **up-to-date** developments; Most information is organization-specific; **Easy to maintain** and **regularly** maintained

4

As appropriate for organization, **sophisticated, comprehensive and interactive Web site, regularly maintained** and kept up to date on latest area and organization developments; Praised for its **user-friendliness and depth** of information; **Includes links** to related organizations and useful resources on topics addressed by organizationQuestion
8Question
9

Not Applicable

Do Not Know

Want to leave a comment?

[Save progress & finish later](#)

Back

Next



LEADERSHIP, STAFF
AND VOLUNTEERS
43 of 43 questions answered

FUNDING
11 of 11 questions answered

VALUES
7 of 7 questions answered

LEARNING AND
INNOVATION
15 of 15 questions answered

MARKETING AND
COMMUNICATION
6 of 6 questions answered

ADVOCACY
44 of 44 questions answered

MANAGING PROCESSES
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY
7 of 9 questions answered

Does our organization's design
facilitate the work we do?

Do we have sufficient infrastructure in
place?

Do we have technology that enables
our work?

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have technology that enables our work?

Question
5Does our organization effectively leverage social platforms to
disseminate information and generate support?Question
6

1 None or **very limited use of social media**
platforms (e.g., Facebook and Twitter);
Accounts that are **rarely updated** and with
a **very small number** of followers; Social
media **used as 1-way \"broadcast\"** of
information

2 **Some use** of social media; Accounts are
updated **at least once a week** and have a
fair number of followers; Social media
messages **span a range of topics**
somewhat related to the organization's
mission; Followers **sometimes provide**
feedback and insight to the organization
via social media

Question
7Question
8

3 **Frequently updated** social media presence
on multiple platforms; Social media
updates **reflect the overall mission** of the
organization; Organization has a **good**
number of followers; Followers
frequently share insight and feedback via
social media

4 The organization has a **strong presence** in
the social media space, with an account that
is well-followed and **updated at least daily**.
The message of the organization is **clearly**
articulated; Social media is used for a
broad range of activities including
fundraising, and actively soliciting
feedback and insight and information
distribution

Question
9

Not Applicable

Do Not Know

Want to leave a comment?


Save progress & finish later


← Back

Next →


LEADERSHIP, STAFF
AND VOLUNTEERS 
43 of 43 questions answered


FUNDING 
11 of 11 questions answered


VALUES 
7 of 7 questions answered


LEARNING AND
INNOVATION 
15 of 15 questions answered


MARKETING AND
COMMUNICATION 
6 of 6 questions answered


ADVOCACY 
44 of 44 questions answered

MANAGING PROCESSES 
15 of 15 questions answered

ORGANIZATION,
INFRASTRUCTURE AND
TECHNOLOGY 
8 of 9 questions answered

Does our organization's design
facilitate the work we do? 

Do we have sufficient infrastructure in
place? 

Do we have technology that enables
our work? 

NAVIGATION

ORGANIZATION, INFRASTRUCTURE AND TECHNOLOGY

Do we have technology that enables our work?

Question
5Do we have database and reporting systems to manage our
information?Question
6

1 ☐ **No systems** for tracking clients, staff
volunteers, program outcomes and financial
information

2 ☐ Electronic databases and management
reporting systems exist **only in few areas**;
Systems perform only basic functions, are
awkward to use or are used only
occasionally by staff

Question
7

3 ☐ Electronic database and management
reporting systems exist in **most areas** for
tracking clients, staff, volunteers, program
outcomes and financial information;
Systems are **commonly used** and **help**
increase information sharing and efficiency

4 ☐ **Sophisticated, comprehensive electronic
database and management reporting
systems** exist for tracking clients, staff,
volunteers, program outcomes and financial
information; Systems are **widely used** and
essential in increasing information sharing
and efficiency

Question
8

☐ Not Applicable

☐ Do Not Know

Question
9

Want to leave a comment?

Save progress & finish later

 Back

Save