

ORGANIZATIONAL READINESS REVIEW

*Five Part Leadership Exercise for
High Performing Nonprofits*



ORGANIZATIONAL READINESS REVIEW

Changing Your Nonprofit Culture to Significantly Advance Your Mission



ORGANIZATIONAL ASSESSMENT

to gain an accurate picture of its “AS IS” culture

DEVELOPMENT PLANNING

to gain a clear picture of its desired “TO BE” culture

CHANGE MANAGEMENT

to close the gap between “AS IS & TO BE!”

Organizational Development (OD) is a planned, systematic and comprehensive effort to increase a nonprofit's performance, sustainability and relevancy.

An OD initiative, if done properly, brings focus and momentum that will move any nonprofit to the next level of success. It is an intentional effort to change an organization to achieve a specific, pre-determined, end result leading to greater success for the nonprofit, its staff, board, volunteers, and community served.

In a nutshell, OD ensures that a nonprofit is worthy of asking donor's for support through an intentional effort to be good stewards of their investment (doing the right things) and to always be exploring the most effective way (doing things right) with the dollars they give. The following list broadly overviews three important elements of an OD process.

This following **Organizational Readiness Review (ORR)** is designed to help you enhance the performance of your organization by assessing the current fitness of five key dimensions of a nonprofit organization.

The five dimensions are:

- 1) Leadership
- 2) Operations
- 3) Staff
- 4) Environment
- 5) Technology



WHO SHOULD PARTICIPATE? (USE YOUR DISCRETION)

Participants will vary depending on the organization but could include:

- 1) Board officers and board members,
- 2) Executive Director and other top executives,
- 3) Development and human resources staff,
- 4) Department heads and frontline supervisors,
- 5) Frontline opinion leaders (*typically long-term employees who can influence others*),
- 6) Volunteers, Donors and Clients served by the nonprofit.

PARTICIPANT ORIENTATION:

The purpose of completing the Organizational Readiness Review...

- ...IS NOT to execute some sort of team building exercise
- ...IS NOT to affect organizational change

...BUT RATHER to seek to understand both the micro and macro needs as identified by the team member completing the ORR. We are about to launch our three year campaign and want to ensure that the operations/projects/endowment (three-part "ask") to be underwritten are an actual reflection of the administrators/volunteers/staff who are responsible to implement the mission of Goodwill Industries.

Simply put, we need to know...what you know...about the actual needs we face as an organization to secure the finances to underwrite the programs for which you are responsible. Each person participating will receive a compiled final report that reflects the insights of every person who contributed.

Please take your time to score each dimension as honestly as possible based on how you feel, most of the time. Also, be sure to respond to the various questions in each dimension.

Please circle the number (2, 1, 0) that best describes how well you think your organization is functioning in each of the following dimensions, then provide additional comments explaining each score.

LEADERSHIP:

Leaders that model values...manage relationships...master change

(Please circle a number below)

2 (Working Well) **1** (Needs Work) **0** (Don't Know/Not Applicable)

What is leadership's role in the organization's current performance and how, if at all, should it change? *(Feel free to rate & comment on your Administrative Leadership separately from your Board Leadership.*

The most effective leaders are those whose personal values coincide with the positive values of the organization and who consistently model those values in their behavior. Their employees see them as honest and sincere, and they are able to instill in their employees a sense of loyalty and commitment. How well does leadership serve as a role model in your organization?

To be successful, a leader must be able to interact effectively with others in a variety of management contexts. Such interaction involves Communicating, Motivating/Developing Others, Team Building, Providing Feedback and Directing Work. How effectively does leadership manage relationships?

The ability not only to respond to change, but to create positive change is a characteristic of effective leaders and successful organizations. This ability to Master Change involves Strategic Thinking, Decision Making, Problem Solving and Organization. What is leadership's track record in managing change?

OPERATIONS (Continued):

How do you make a difference? Provide program names and one paragraph description of each specific service program.

PROGRAM NAME #1

PROGRAM ANNUAL COST #1

PROGRAM ANNUAL REVENUE #1

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #1

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

OPERATIONS (Continued):

Provide program name and one paragraph description of service program.

PROGRAM NAME #2

PROGRAM ANNUAL COST #2

PROGRAM ANNUAL REVENUE #2

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #2

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

OPERATIONS (Continued):

Provide program name and one paragraph description of service program.

PROGRAM NAME #3

PROGRAM ANNUAL COST #3

PROGRAM ANNUAL REVENUE #3

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #3

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

OPERATIONS (Continued):

Provide program name and one paragraph description of service program.

PROGRAM NAME #4

PROGRAM ANNUAL COST #4

PROGRAM ANNUAL REVENUE #4

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #4

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

OPERATIONS (Continued):

Provide program name and one paragraph description of service program.

PROGRAM NAME #5

PROGRAM ANNUAL COST #5

PROGRAM ANNUAL REVENUE #5

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #5

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

OPERATIONS (Continued):

Provide program name and one paragraph description of service program.

PROGRAM NAME #6

PROGRAM ANNUAL COST #6

PROGRAM ANNUAL REVENUE #6

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

PROGRAM DESCRIPTION #6

DOES THIS PROGRAM REQUIRE CAPITAL EXPANSION? IF SO PLEASE DESCRIBE:

STAFF:

Their Knowledge...Skills...and Abilities... Organizational Structures...Policies & Procedures

(Please circle a number below)

2 (Working Well) 1 (Needs Work) 0 (Don't Know/Not Applicable)

How does the organization determine the knowledge the staff must possess to be effective in their jobs?

How are staff skill levels determined and what, if any, methods exist to continually increase staff competencies?

What is the staff's level of responsibility & accountability for producing results? What, if any, systems exist to reward or redefine employee behavior with regard to their abilities to perform?

How does the present organizational structure impact staff performance, growth, outcomes, revenue, services, programs & your organization’s capacity to raise money?

What, if any, human resources systems exist for hiring, orientation, development, and performance appraisal of staff? What impact does workforce performance have on organizational outcomes?

What written policies and procedures exist that define what the organization does, how it is done, and why it is done. How, if at all, should these change?

ENVIRONMENT:

Attitudes, Perceptions & Relationships Within the Organization

(Please circle a number below)

2 (Working Well) **1** (Needs Work) **0** (Don't Know/Not Applicable)

What, if any, impact do employee and volunteer attitudes have on organizational performance?

How much attention is paid to enhancing perceptions, insights and understanding between leadership, staff, volunteers, board with regard to organizational performance?

What is the current quality of relationships in the organization? How would you describe the current level of teamwork? How much attention is paid to staff satisfaction? How does the organization respond to interpersonal problems, conflicts & disagreements?

TECHNOLOGY:

Your Software Systems...Hardware Infrastructure...Online Strategies

(Please circle a number below)

2 (Working Well) **1** (Needs Work) **0** (Don't Know/Not Applicable)

How efficient and effective are the organization's current software systems? Which systems work well and which systems need to be enhanced or replaced?

How would you rate the organization's ability to provide the tools and technology you need to perform your job?

How would you describe your organization's use of the Internet, social media and the worldwide web to enhance organizational performance?

Based on your responses to each of the five dimensions of Organizational Readiness...

Which dimension do you feel is working best? Why?

Which dimension do you feel needs the most work? Why?

How would you improve the dimension you feel needs the most work?

AUTHORS – ORGANIZATIONAL READINESS REVIEW



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John Curtis, Ph.D. is a senior nonprofit consultant, researcher, organizational development specialist, and business trainer. His experience spans 35 years and involves providing a wide array of consulting services to nonprofits nationwide. He began working in the nonprofit sector in 1973 and has developed a proven track record in bringing sound organizational principles and leadership practices to hundreds of nonprofit boards, executive directors, management teams and frontline staff. He has lead 125+ strategic planning initiatives, conducted 75+ organizational inventories, has completed 18+ community assessments and provided hundreds of hours of nonprofit human relations training. John has a strong research background incorporating proven research methodology based on an academic foundation. As a result of his experience, his organizational research initiatives reveal practical and relevant information that organizations use to make data-driven decisions that result in measurable improvement in outcomes. He specializes in creating and implementing comprehensive organizational development interventions that achieve greater client satisfaction, enhanced employee commitment and increased organizational performance. In addition to being a member of the NDI faculty, he also teaches for the Rollins College Philanthropy & Nonprofit Leadership Center in Florida and the Duke Nonprofit Management Program in N. Carolina and Virginia.

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James P. LaRose, CFRE, CNC known around the world as “Jimmy LaRose the Fundraiser's Fundraiser,” continues to transform nonprofit executives tasked with the raising of money in a tumultuous 21st Century economy. His passion for the nonprofit sector is without bounds and his love for the leaders who serve is unparalleled. His heroes are those men and women of the charitable world who lay down their lives daily for the hurting and the hopeless. He’s spent the last twenty years supporting executives, volunteers, staff and board members across six continents who spend themselves in service to others. Jimmy is fond of sharing with professionals that, “Money chases after ideas, and there will always be generous people who will amply support a great dream backed by a sound plan.” Jimmy is the founder of the National Development Institute, Development Systems International and ProPlatforms.com. He is the author of the internationally recognized fundraising series MAJOR GIFTS RAMP-UP and is the designer of the MAJOR GIFTS RAMP-UP CLOUD, a complete back-office for nonprofit executives. Jimmy led the design team that established Certified Nonprofit Consultant (CNC), a credentialing process that supports nonprofit executives committed to sharing their management experience with their peers. He is the co-founder of the CauseCause.com platform, an online social media community network that supports citizens of the world committed to advancing the common good. He is the co-founder of DonorScope.com, a web-based research portal that identifies altruists, philanthropists and their capacity to give to causes for which they personally care. Jimmy has been credentialed by the National Development Institute as a Certified Nonprofit Consultant (CNC) and holds the Certified Fund Raising Executive (CFRE) certification. He is the founding President of the Western Maryland Chapter of the Association of Fundraising Professionals (AFP) and is a graduate of AFP's Faculty Training Academy (FTA) and has been named by the AFP as a “Subject Matter Expert” on the raising of money. Jimmy has also served as a specialist with the U.S. State Department's Speakers Bureau and has traveled the world working with embassies, foreign governments, and leaders to promote philanthropy and civil society in developing countries. He is a graduate of Indiana University's Executive Leadership Program, Indianapolis, IN, the National Planned Giving Institute, Memphis, TN, Tennessee Temple University, Chattanooga, TN. Jimmy and his wife Kristi make their home in Lexington, SC.

ADDITIONAL ONLINE FUNDRAISING RESOURCES:

www.MajorGiftsRampUp.com

www.FundraisingFarmer.com

www.Development.net

www.DonorScope.com

www.facebook.com/James.P.LaRose

www.ConsultingCertification.org

www.NonprofitConferences.org

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