NonprofitCenter
of Northeast Florida

Connect · Strengthen · Advocate

**Nonprofit Center of Northeast Florida
Organizational Assessments**

The Nonprofit Center of Northeast Florida provides assessment experiences for nonprofit organizations. The custom-designed assessment tool is based on the McKinsey grid and has been altered to reflect nonprofit needs in Northeast Florida. It can be applied to the entire organization or to one area of the organization.

The assessment tool evaluates a range of capacity areas, including organizational development, leadership development, revenue development, program development, and community engagement, then asks the nonprofit's stakeholders to rank their organizational priorities. The general tool can be customized for the specific organization's needs.

The Nonprofit Center gathers the assessment information from key staff, Board members, and potentially other stakeholders. Data is compiled from both anonymous online surveys and in-person interviews. All data is analyzed by the Nonprofit Center, then summary data and a suggested action plan are shared with the organization

As a follow-up to the assessment, the Nonprofit Center is available to either assist with implementation of the action plan, as appropriate, or refer the organization to other experts who may be able to assist.

References and resumes are available upon request.

For more information, please contact Leah Donelan, Nonprofit Center Vice President, at ldonelan@NonprofitCtr.org or 904-425-8758.

About the Nonprofit Center
The Nonprofit Center is a 501(c)3 organization that connects, strengthens, and advocates on behalf of local nonprofits to create a more vibrant northeast Florida. The Nonprofit Center has been consulting with nonprofits since its inception in 2002 and is the local expert in nonprofit board governance and capacity building. Its consulting work consists largely of conducting and facilitating board trainings, conducting organizational assessments, and facilitating implementation of governance or capacity building initiatives. For more information, visit www.NonprofitCtr.org.

XX Organization
Board Assessment Results
Prepared by the Nonprofit Center of Northeast Florida

XX Organization, a 501(c)3 nonprofit organization located in Jacksonville, with the mission to serve as the premier community resource for XX, engaged the Nonprofit Center to conduct an assessment of the current capacity of the Board of Directors, make recommendations based on that assessment, and implement a training program. The online assessment closed on January 21, 2015 and was completed by 19 Board members and advisors – a return rate of 95%. The final assessment results also incorporate evaluation results from the organization's Board Officers' Retreat in July, 2014.

The assessment asked Board members to rate their organization's capacity in five categories (Organization Development, Revenue Development, Leadership Development, Community Engagement, and Program Development), as well as personal behavior in fulfilling Board responsibilities and how the Board operates. It also asked Board members to prioritize the categories for XX Organization.

The results of the assessment show that XX Organization, from the perspective of its Board members, is an organization with a clear vision and shared values that plans well and has active Board members. XX Organization models many best practices and had scores that would be considered successful in several areas. However, there is always room to improve, and this summary document highlights both strengths and challenge areas relative to those strengths. The assessment also reveals the priorities of the organization in relation to some of its challenges. Based on the assessment results, the Nonprofit Center recommends seven action steps, outlined on page five.

The full set of data from the assessment is available upon request.

Assessment Results Summary

Success Areas

The top seven areas of capacity for XX Organization are:
Chart 1

Category	Area	Average (scale of 1-4)
Organization Development	Financial Operations and Management	3.59
Revenue Development	Financial Planning and Budgeting	3.44
Organization Development	Operational Planning	3.44
Organization Development	Vision	3.44
Organization Development	Shared Beliefs and Values	3.42
Organization Development	Strategic Planning	3.39
Community Engagement	Partnership and Alliance Development	3.37

These demonstrate that XX Organization is strong in the organization development category – 5 of the 10 areas assessed in that category were ranked highly as a success. In addition, *Financial Planning and Budgeting*, as well as P*artnership and Alliance Development* are successful areas, according to the Board.

Another common thread in the top areas of capacity is the successful focus on planning. Strategic, operational, and financial planning are all strong areas for XX Organization. This may reflect the ongoing implementation of the current strategic plan, as well as the planned update of it this year.

Something of note: although *Vision* and *Shared Beliefs and Values* are ranked as great successes, *Mission* doesn't appear on the ranked list until number 15 out of 29. According to the criteria in the assessment, this could be because the mission statement does not fully describe the values and purpose of the organization or that it is not as widely known throughout the organization as it could be. It could also signal that there is some disagreement or misunderstanding about the mission of the organization.

There were very positive results when the Board rated their own behavior and operations. The Board considers its successful areas to be in individual participation – attending Board meetings, making personal financial gifts, understanding and promoting the mission of XX Organization, and promoting the organization to their individual networks. In addition, the vast majority of Board members agreed that serving on the XX Organization Board was rewarding to them personally.

Chart 2

Responsibility/Task	Success (scale of 1-5)	Personal Comfort Level (scale of 1-5)
Support the organization with financial contribution	4.32	4.67
Promote the organization to your network	4.21	4.47
Understand and communicate the organization's mission	3.95	4.32
Attend Board meetings	3.95	4.26

Statement	True (scale of 1-4)
Serving on this Board is satisfying and rewarding to me.	3.53

Challenge Areas

The eight lowest ranked areas of capacity for XX Organization are:
Chart 3

Category	Area	Average (scale of 1-4)
Community Engagement	Influencing of Policy Making	2.58
Community Engagement	Ability to Motivate and Mobilize Clients	2.67
Community Engagement	Local Community Presence and Involvement	2.68
Leadership Development	Dependence on ED	2.71
Organization Development	Legal and Liability Matters	2.8
Organization Development	Monitoring of Landscape	2.81
Community Engagement	Public Relations and Marketing	2.95
Revenue Development	Fundraising	2.95

The Board clearly considers the category of community engagement to be a struggle – four of the bottom eight areas are from that category. This includes advocacy work, engaging clients in the organization after they receive services, name-recognition in the community, and marketing. The *Influencing of Policy Making* in particular seems to be an area of confusion – 7 Board members responded that they didn't know about the organization's advocacy work.

Other notable results:
- The Board does not know about the legal support and liability infrastructure – 47% of the Board answered "I don't know."
- The Board considers fundraising a struggle - this may indicate they think the organization needs more capacity to fundraise.
- Many Board members say the organization has no succession plan, which contributes to the low score for dependence on the Executive Director.
- The Board may not feel educated on who the other players or alternative models are in the program/mission area.

The least successful of Board responsibilities are also the areas where members are the least confident in their ability. They also require time spent as a group in discussion, sharing successes, and/or brainstorming opportunities. Those include:
Chart 4

Responsibility/Task	Success (scale of 1-5)	Personal Comfort Level (scale of 1-5)
Ask tough questions of the organization	3.32	3.47
Support the organization by volunteering	3.68	4.16
Participate actively in Board meetings	3.79	4.05
Participate in fundraising activities	3.79	4
Connect the organization with opportunities	3.79	4

It is important to note, that although the above responsibilities are the lowest of the given list, scores are still relatively high overall. XX Organization is certainly not in a crisis situation, but the assessment does identify areas that XX Organization can improve to become an even more effective organization.

When we look at Board operations, four areas stand out as challenging.
Chart 5

Statement	True (scale of 1-4)
Conflicts on the Board are managed effectively.	2.74
The committee structure is effective and efficient.	2.74
The Board has effective problem-solving skills.	2.79
The Board's decision-making processes are effective.	2.89

A significant number (3) of Board members did not know if conflict was managed effectively. This may mean that there is little conflict, or that it is handled so well that there appears to be no conflict, or that conflict resolution practices could be strengthened.

There may be a connection between reluctance to ask tough questions and participate actively in Board meetings (Chart 4) and the belief that conflict resolution, problem-solving, and decision-making practices could be improved (Chart 5). If the organization improves the practices, the behavior may change with them.

There is also a strong indication that the committee structure of the Board should be improved.

Board Priorities

Just because an organization has an area they consider to be a challenge does not necessarily mean that improving that area is a priority at that time. In order to develop a relevant work plan for the Board, we must compare their strengths and challenges to the priorities of the organization.

The Board was asked to rank each of the five categories in order of priority. According to the Board, the top three priority categories are:
- Revenue Development (4.47 out of 5)
- Community Engagement (4.37 out of 5)
- Program Development (4.26 out of 5)

Comparing each priority category with the lowest ranked areas within it gives us the start of a Board work plan. Those are:

- Revenue development
  - Fundraising
  - Revenue creation
  - Funding model
  - Board involvement and participation in fundraising

- Community engagement
  - Influencing of policy making
  - Ability to motivate and mobilize clients

- Local community presence and involvement
- Public relations and marketing

- Program development
  - Performance analysis and program adjustments
  - Program goals/targets
  - Program growth and replication

Recommendations

Based on the assessment results, the Nonprofit Center recommends the following action plan. It is broken into two parts – items that the Nonprofit Center could provide training and implementation support on, and items that the organization may choose to implement on its own. The Strategic Planning and Marketing Committee should review the recommendations, decide which to implement, and integrate them into the organization's strategic plan.

Nonprofit Center Support

The Nonprofit Center can provide support in the following ways. They can be altered to better fit the needs of XX Organization.

1. Generative Leadership Training (1.5 hours) – The Generative Leadership training could include:
   - Defining active participation at Board meetings, including evaluating meeting structure and measuring engagement
   - Updating conflict resolution, problem solving, and decision making practices
   - Demonstrating how to monitor the landscape for XX Organization, including practicing generative thinking

2. Community Engagement Training (2 hours) – the Community Engagement training could include:
   - Advocacy – how to do it legally and effectively
   - Facilitated discussion on how to engage clients as supporters of XX Organization
   - Ways that Board members can act as marketing and communications support for the organization
   - Aligning PR and recognition with organizational capacity

3. Review and update Board committee structure and operations. This would be done with a small, ad hoc group of Board and staff members and could include reviewing the mandates and organization of standing and ad hoc committees, establishing committee operational guidelines, and bringing any suggested changes to the full Board for approval. This would be done outside of a training setting.

Other Recommendations

The following recommendations, based on the assessment results, will help XX Organization increase their Board and organizational capacity.

1. Use the planned strategic plan update process to focus on current program analysis and a program growth plan, with identifying appropriate ways to gather Board input and communicate updates to the Board. The growth plan should also include financial/fundraising

projections, as well as a plan to increase capacity to administer the programs. The updated strategic plan could also include a regular process to educate about and get new ideas from the Board on other players and programs in the field (*Monitoring of Landscape*).

2. Focus on engaging the Board in fundraising activities outside of personal gifts. This would be a partnership between the Board and staff, and may include highlighting opportunities outside of board meetings and/or engaging Board members in cultivation and recognition activities.

3. Develop a formal Executive Director succession plan, focused on emergency and planned departures, staff development and cross training, and Board responsibilities for the succession.

4. Educate the Board on existing legal and liability policies and procedures.