

Organizational Assessment—Who We Are and What We Do

Conducting an organizational assessment is really nothing more than exploring what your organization does now and for whom. To undertake such an assessment effectively we have to take a look at three separate components:

- (1) current goals and objectives;
- (2) program and activities; and
- (3) communications and organizational structure.

The following discussion and exercises will help you address each of these issues.

Assessing Overall Goals, Objectives, and Results

Whether your organization has been in existence for many years or several weeks, a common sense of who you are and what audiences you serve is essential to your long-term success. Quite simply, this is the only effective foundation upon which you can build any long-term plan for your future.

While there will be separate opportunities for reviewing other data and perspectives about your organization in Workbook 2: What Shapes Our Future? let's begin by looking at some of the more important fundamental questions related to the internal day-to-day operations of your organization.

Exercise #1 (60–90 minutes)

Have your group answer the following questions. Depending on your group's structure and circumstances, not all of the following questions may be equally relevant. As such, your organization may choose to spend more time on some of these questions than others. However, it is important to address as many of these as possible, as they set the stage for many of the discussions we will have as we move through the entire strategic planning process.

1. **Who are we? If someone asked us what our organization does, how would we answer the question?**

2. **What are the basic issues our organization seeks to address? Has this changed over the last 3–5 years?**

3. **What are our organization's main philosophies and values?**

4. What makes our organization distinctive or unique?

5. Who are our customers or the primary beneficiaries of our services? How have they changed? How are they likely to change?

6. What have been our results? Have we measured and recorded these as effectively as we should? Where are these documented?

7. How effective has our staff been at addressing the needs of this organization and our clientele? Do we have measures of this and methods for addressing improvements?

Assessing Your Organization's Program and Activities

Individual programs are also an important part of your organizational assessment.

Taking the time to look at these individually and in the context of your other strategic planning and visioning questions allows you to focus on the overall goals and the methods you employ to achieve these goals.