

## Organizational Assessment Process

### *What is an organizational assessment?*

It is a free service of the Collaborative Initiative for Management Assistance, a partnership formed by The Community Foundation of Southeastern Connecticut and Bank of America as Trustee for the Frank Loomis Palmer Fund, offered to qualifying non-profit agencies on a competitive basis. Its purpose is to help board members and key staff of an organization agree on the governance and management issues affecting the organization. Members of your board and staff participate in one or more facilitated meetings, each lasting about two hours. The discussion will be guided by a trained facilitator who will ask a series of questions on how your agency is governed.

By the end of the session(s) your organization should have been able to reach consensus on those issues that need to be addressed through technical assistance. You will receive a report of the discussion for your review and approval. This report can then be used both internally as well as by the consultant you ultimately hire to provide you with technical assistance.

### *Once approved, what steps does my organization take to receive this service?*

1. Call the facilitator as soon as possible to discuss the format and timeframe for the assessment.
2. Provide the facilitator with requested information which can include a copy of your budget and audit report, your board list, written material about your agency and program, a mission statement, etc.
3. Identify key staff and board members who should participate. Selection criteria should include:

*Function within the organization.* It is a requirement that the board chair and the executive director be part of the assessment discussion. In addition, you should consider other key board and staff. If the organization relies heavily on volunteers, you might include one or two of them.

*Perspective.* It is useful to have individuals with differing perspectives and roles within the organization who would add information to the process.

*Sufficient number of participants.* The process works best if there are at least 5 and no more than ten participants.

4. Schedule meeting, allowing sufficient time for the session. Each assessment takes about four hours of discussion. Your group might prefer two two-hour sessions, or one four-hour meeting. You may select either day or evening meeting times.
5. Try to be as forthright as possible in order for the self-assessment process to be most productive.
6. After you receive the assessment memorandum documenting the facilitated discussion, read it carefully for tone and content, discuss with other participants, and return to the facilitator for corrections.

*How does the organizational assessment affect my chance of receiving a grant from any members of the Collaborative?*

The organizational assessment is separate and distinct from the grant making of The Community Foundation and the Palmer Fund. If you have applied for a program grant, participating in an assessment neither improves nor reduces your chances of getting the grant.

On the other hand, after completing an organizational assessment, you are eligible for a Technical Assistance Grant. Based on the results of your organizational assessment, you may wish to apply for funds to enhance organizational effectiveness in a particular area.

There are no specific deadlines for applications.