

Organizational Assessments

**Mid-Atlantic
Volunteer Monitoring Conference**

August 10, 2013



Evaluations and Assessments

- ◆ Taking stock annually to determine value, progress, capacities, and needs.
- ◆ Collecting opinions and perceptions

Guidelines for an Organization

Strategic Plan



Annual Work Plan



Annual Budget



Annual Fundraising Plan

Types of Assessments

- ◆ Programmatic
- ◆ Staff
- ◆ Board
- ◆ Organizational

Assessments by Whom?

- ◆ Self
- ◆ Leadership – Board and/or Staff
- ◆ External Stakeholders
- ◆ Outside consultants

Benchmarks (Metrics) to Track

- ◆ Organizational – health of the org – important to realize long term mission and vision of org
- ◆ Programmatic – activities of the org
- ◆ Watershed – overall river/watershed health

Benefits of tracking numbers

- ◆ Celebrate the incremental achievements that lead to long term success
- ◆ Realize more outcomes on the ground
- ◆ Acquire more money, members, volunteers, etc

It makes you more effective

Organizations that identify areas to strengthen:

- ◆ Are more active in protecting their waterbodies

- ◆ Report more environmental improvements



How assessments benefit your organization

- ◆ Helps to ensure healthy organizational development and long-term sustainability
- ◆ Identify priority organizational development needs
- ◆ Assess programmatic capacity and support implementation
- ◆ Assesses progress over time, and helps quantify success.
- ◆ Information is always available

More Benefits

- Better planning

Oh no,
this could
go on
forever.

Next Planning Topic:
Making Our
Organization Stronger
(Capacity Building)





Top Priorities:

- Set annual plan
- Specify our role in the watershed
- Recruit diverse board members
- Increase outreach

Luckily, you all completed the Internal Assessments, and it turns out we pretty much agree on our top four needs:



Wow, those
Internal
Assessments
helped focus this
discussion.

Top Priorities:

- Set annual plan
- Specify our role in the watershed
- Recruit diverse board members
- Increase outreach

So let's just start
with these.

It Saves you Time

- ◆ Your organization can decide quickly what to devote time to
- ◆ Your data is organized and accessible



I could have sworn it
was in here,
somewhere...

Online Assessment Survey



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Free Online Diagnostic Tool for Your Group

Posted: 02/17/2012



During the past year River Network has been revising its current organizational assessment tool. The new version, now available online, is a two-part diagnostic survey for river and watershed groups across the country. It is designed to:

- assist organizations in the identification of priority organizational development needs;
- assess programmatic capacity to effectively engage and support project implementation
- assess the progress over time of the growth in operational capacities.



The online survey is divided into two sections, both which need to be completed by the organization. Section One, called the Status Report, seeks quantitative data about the organization's programs and operational structures (#, %, \$) and is completed only by ONE person from the organization. Section Two, called the Internal Assessment, captures perceptions and opinions from several people within the organization (Board, staff, volunteers, etc), thus compiling a picture about the organization's priorities and efficiencies. (If requested by the responder, the source of all perceptions and opinions will be kept confidential.)

Once everyone from the organization has responded to the survey, the organization will receive by email a composite report. This report will aid the group in determining its capacity building needs and its future organizational priorities. The organization will be able to interpret the data (with the help of a capacity building professional) to decide which best management practices it may need to install and/or improve for the health and sustainability of its organization.

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Tips for successful use of the survey

- ◆ Review the FAQs
- ◆ Review survey questions before starting
- ◆ Gather your org's data before starting
- ◆ Recruit others to participate
- ◆ Answer honestly and frankly



Organizational Status Report Survey

A diagnostic tool for you to gather essential information about your organization, and for River Network so it can better serve you.

Statements of Confidentiality

[close window \(X\)](#)

River Network protects the confidentiality of the user on the website. Your survey answers will be confidential unless you specify otherwise. River Network will not share them with funders or others, except as aggregate data in which no one organization can be identified individually, unless you specify otherwise. You will receive an email with your answers, and of course you may share that as you wish.

Chesapeake Bay Funders Network (CBFN): This survey will help you and your organization assess and prioritize organizational and technical needs. The information is gathered primarily for your benefit. CBFN guarantees the confidentiality of your data. None of your data is directly forwarded to CBFN and/or its partners; only aggregate data is shared, unless you give permission to release your specific data.

What's your email?

CONFIDENTIALITY: Your answers will be confidential unless you specify otherwise. River Network will not share them with funders or others, except as aggregate data in which no one organization can be identified individually, unless you specify otherwise. You will receive an email with your answers, and of course you may share that as you wish.

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mat) so you can gather the information

You can also view examples of the

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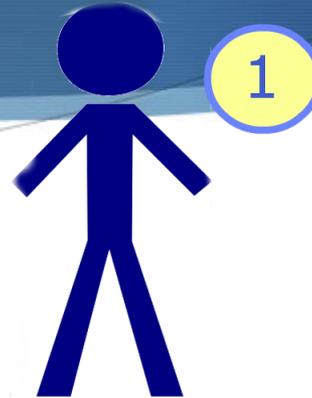


Format

A two-part online survey:

- ◆ Part One – Status Report
- ◆ Part Two - Internal Assessment

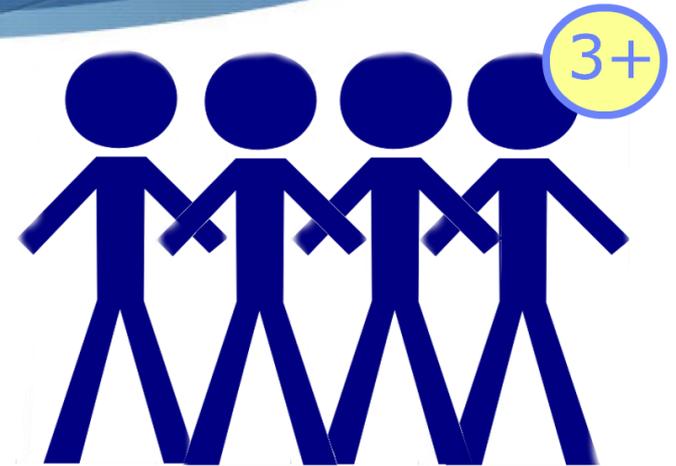
Part One Status Report



- One responder
- quantitative data - #, %, \$, yes/no
- programmatic metrics and OD indicators
- complete and submit part one to access part two

Part Two – The Internal Assessment

- accessible only after Part One is submitted
- multiple responders
- opinions/perceptions regarding importance and proficiency
- programmatic & organizational operations





River Network

Connecting People, Saving Rivers

Internal Assessment Results

for LeadGreen

Dear Baird,

Thanks for filling out the Internal Assessment Survey at rivernetwork.org. Your responses are below, which may serve you if you have a discussion with your board members and staff about where to focus your attention in order to build your organization.

Here's the data you gave us in the Internal Assessment:

PROGRAMMATIC: SECTION 1

Importance: 4 - Very important; 3 - Important; 2- Somewhat important; 1 - Not important; 0 - Unknown or n/a

Proficiency: 4 - Excellent; 3 - Good; 2 - Adequate; 1 - Poor; 0 - Unknown or n/a

Importance at this time:

Proficiency:

Advocacy for policy change:

3 - Important

1 - Poor

Community organizing:

3 - Important

4 - Excellent

Importance at this time:

Proficiency:

Advocacy for policy change:

3 - Important

1 - Poor

After completing the survey ...

- ◆ Status Report emailed to you from River Network
- ◆ Composite report of Internal Assessment
- ◆ Data saved for future use

Access to the online survey

Go to River Network's web site

<http://www.rivernetwork.org/news/free-online-diagnostic-tool-your-group>

<http://www.rivernetwork.org/status-report-survey>

Questions ...



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