Organizational Readiness Assessment – Facilitator's Guide

Overview:
The Organizational Readiness Assessment Tool is designed to help you and the organization determine their level of readiness to embark on enhancing the organization's community building efforts. It can serve as a catalyst for discussion and help determine the most appropriate area of focus as the organization strengthens its capacity to support social change.

Preparation:
Prior to administering the tool, work with the organization's leadership to identify who should be invited to participate in completing the tool, and clarify who will be involved in reviewing the results. Engaging the appropriate stakeholders in the process will help to ensure that an accurate picture of the organization is created through the assessment process.

For best results, encourage the organization to invite a wide range of stakeholders – both internal and external to the operations of the organization – to respond to the assessment tool. This may include: leadership, staff, and volunteers within the organization, clients/participants/constituents, staff from partner organizations, and community members familiar with the organization and its operations.

In order to get the most accurate and candid responses to the questions, design a response approach that allows for anonymity. It is important that potential assessment respondents know that their responses will not be linked back to them as individuals.

Prior to conducting the readiness assessment, ensure that the organization has identified the individuals who will participate in the review and discussion of the assessment results. Again, this would ideally consist of a range of stakeholders who may then serve to guide next steps.

Administering the Assessment
First, provide context for the assessment respondents – Why are we doing this assessment? How long will it take? How do we expect it to inform us? How will we use the results? Understanding why the assessment process is being conducted and how the information will be used, will help them provide the most accurate rating for each of the areas to be assessed. This may be achieved through holding an orientation meeting, or through an informational email.

Provide a copy of the assessment tool to each respondent. For each item, the respondent is to select the statement that most accurately describes the organization for that area. Upon completing the assessment, have them total their responses in Part II.

Once all participants have completed and scored the assessment tool, it may be turned in anonymously to one central place. The facilitator or lead of the assessment process may then summarize the results – either by averaging all the scores, or compiling the range of results to present to the group that will use it to take the next steps. Thank the respondents for their time and let them know that their contribution to the work of the organization is meaningful and appreciated.

Utilizing the Assessment

Based on the scores, guide the reviewing team through a process to determine how best to proceed with building capacity in the four areas – Constituent Engagement, Partnering with the Community, Coordination, Collaboration and Collective Impact, and Social and Systems Change. The team may elect to focus on one at a time, starting with an area of strength, or an area where capacity building is most needed, or it may determine that working in multiple areas simultaneously makes the most sense. The decision should be based on the unique characteristics and readiness of the organization. There is no right way to begin to take the next steps.

Or, if the assessment reveals gaps in readiness that might hinder potential progress in building capacity, such as leadership that does not demonstrate inclusiveness, or the organization doesn't have a clear mission or vision related to social change, it is important to strengthen those areas before embarking on significant community development activities.

The review process may illuminate strengths to build upon, areas currently under development, or those in need of specific focus that the reviewing team members believe are integral to the success of the constituent engagement/community-building development process.   Spending time to clarify these and explore potential paths, rather than moving quickly to next steps, will help ensure a process that results in change that becomes institutionalized.

Organizational Readiness Assessment

As a part of our ongoing work to integrate social change activities into our daily practice, we are striving to enhance our community engagement and community building capacity. Toward that end, we are seeking your input to determine our best starting point. This readiness assessment will help us determine our preparedness to increase capacity in the following areas:

- Constituent Engagement
- Partnering with the Community
- Coordination, Collaboration and Collective Impact, and
- Social and Systems Change

Who is Participating?

In order to ensure our assessment process reflects the knowledge and perceptions of a wide range of stakeholders, we may invite individuals from the following groups to complete this assessment: leadership, staff, and volunteers within the organization, board members, clients/participants/constituents, staff from partner organizations, and community members familiar with the organization and its operations. Each participant will have a unique view of the organization, thus helping us understand where we are, and where we can best continue to develop.

How Do I Take the Assessment?

For each item, select the statement that most accurately describes your perception of the organization for that area. Upon completing the assessment, record the totals for your responses in Part II of the assessment.

Once you have completed and scored the assessment tool, please return it to _____.

How Will the Assessment be Utilized?

Based on the results of the responses, the organization will determine how best to proceed to build capacity in the four areas – Constituent Engagement, Partnering with the Community, Coordination, Collaboration and Collective Impact, and Social and Systems Change.

NOTE: Your individual responses will remain confidential and will not be linked to directly to you.

Thank you for taking the time to complete this assessment tool!

Relationship to Organization (Check the one that best describes your role)

☐ Manager	☐ Volunteer	☐ Constituent (Client/Participant)	☐ Partner Agency
☐ Staff	☐ Board member	☐ Community Member	☐ Other (Please name)

(Note: This assessment uses the term 'constituent' when referring to people who receive services from, or participate in activities of, the agency)

Instructions: For each statement below, based on your knowledge, place a checkmark in the box that best describes the statement. If you have any comments or reflections about a section, please record them in the space provided.

Upon completion of Part I, total your responses in Part II and submit it.

PART I:

A. Vision and Mission and Goals

	For each statement below, please check the box that most closely describes the organization.	Yes, this is true!	This is developing or in process	No, not at this time	Don't Know / Not Sure
A1	The organization has a written vision statement.				
A2	The vision is understood by the board, leadership and staff.				
A3	The organization's vision guides the work of the organization.				
A4	The organization has a clearly defined written mission statement.				
A5	The organization's mission is understood by the board, leadership and staff.				
A6	The organization's mission guides the work of the organization.				
A7	The organization's vision and/or mission references community development and/or social change				
A8	The organization reviews its vision and mission periodically to ensure it continues to be appropriate in guiding its work.				
A9	The organization evaluates its services and activities periodically to see that they support/are aligned with the vision and mission.				
A10	The organization conducts periodic reviews/evaluation to measure services and activities as related to written goals.				
Reflections/Comments:					

B. Leadership and Governance

For each statement below, please check the box that most closely describes the director, senior managers, and middle managers. The organization's leaders:	Yes, this is true!	This is developing or in process	No, not at this time	Don't Know / Not Sure
B1	Are well-informed about and understand the strengths, needs, challenges and concerns related to the work of the organization.				
B2	Are well-informed about and understand the strengths, needs, challenges and concerns related to the organization's constituents and the community it serves.				
B3	Are reflective of the community served with regard to gender, ethnicity, age, and cultural background.				
B4	Are open to new ideas and willing to explore opportunities to do things differently.				
B5	Create opportunities for and support others to serve as formal or informal leaders.				
B6	Actively seek input and contributions from and engage others in decision-making and policy-setting.				
B7	Express, through their words and actions, a value for engaging constituents and community members in community development and/or system change				
Reflections/Comments:				

C. Staff

For each statement below, please check the box that most closely describes the direct service staff, administrative support staff, and supervisors. The organization's staff:	Yes, this is true!	This is developing or in process	No, not at this time	Don't Know / Not Sure
C1	Are well-informed about and understand the strengths, needs, challenges of the community they serve.				
C2	Are reflective of the community served with regard to gender, ethnicity, age, and cultural background.				
C3	Actively seek input and contributions from constituents.				
C4	Know which other agencies/groups the organization partners with.				
C5	Support the organization's vision and mission as demonstrated through their work				
C6	Express an awareness that constituents live within, and are impacted by, the conditions in the community				
C7	Express, through their words and actions, a value for engaging constituents and community members in community development and/or system change				
Reflections/Comments:				

PART II:

For each section, count the number of responses in each column and record them in the appropriate box. Calculate the total for each column, then add up the totals and put the sum in the "Column Total" boxes.

Rating	Yes, this is true	This is developing or in process	No, not at this time	Don't Know Not Sure
Section A: The Organization				
Section B: The Leadership				
Section C: The Staff				
Column Total				