

The Organizational Effectiveness Survey: Developed by Center Point for Leaders Consulting

I. Mission-Directed Organization Indicators

1. The organization uses the mission statement as a criterion for determining success.

Yes No N/A

2. Mission and vision statements are communicated throughout the organization and prominently displayed.

Yes No N/A

3. Actions and programs of the organization reflect the mission and vision statements.

Yes No N/A

4. Procedures are in place for the review of the mission statements at appropriate intervals.

Yes No N/A

5. The organization can demonstrate that it reviews its mission and vision statements at regular intervals and makes necessary adaptations that support its strategic plan.

Yes No N/A

6. The organization can document how the strategic and/or business plans are aligned with the mission.

Yes No N/A

7. The organization is able to cite examples of cases in which decisions at all levels of the organization were guided by the mission and values of the organization.

Yes No N/A

8. A dynamic and engaged Board clearly understands governance and carries out its responsibility to the organization.

Yes No N/A

II. Sustainable Organization Indicators

1. The organization has diverse funding sources so it is not overly dependent on a single funding source.

Yes No N/A

2. There is mutual respect, knowledge and integrity between the organization and funders.

Yes No N/A

3. The organization communicates with its major funders on an ongoing basis to address fiscal issues or challenges.

Yes No N/A

4. The organization attracts, creates, and sustains sufficient new resources by continuously seeking potential funding sources.

Yes No N/A

5. Appropriate financial controls are established and followed within the organization.

Yes No N/A

6. Independent auditors conduct financial audits and reviews at regular intervals.

Yes No N/A

7. Financial crises are managed (unpredictable events that are the result of circumstances beyond the control of the management of the organization).

Yes No N/A

8. The organization's leadership has, as a matter of written policy, established a reserve fund sufficient to cover the organization's operating expenses for a planned period of time.

Yes No N/A

III. Customer-Focused Organization Indicators

1. Everyone connected to the organization treats customers with respect and courtesy.

Yes No N/A

2. Facilities provided for customers are safe and well maintained.

Yes No N/A

3. There are well-established, readily available and publicized channels through which the opinions and concerns of customers may be expressed.

Yes No N/A

4. Feedback from all customers is solicited and responded to on an ongoing basis.

Yes No N/A

5. Customer satisfaction is a primary concern.

Yes No N/A

6. The organization understands the needs of stakeholders and constituencies.

Yes No N/A

IV. Entrepreneurial Organization Indicators

1. The organization continually pursues opportunities that are aligned with its mission.

Yes No N/A

2. The organization has taken the lead in identifying unmet community needs and developing innovative solutions to address those needs.

Yes No N/A

3. The organization continually pursues new resources to apply to fulfill its mission.

Yes No N/A

4. The organization shows entrepreneurial spirit by taking responsible risks to develop or promote new programs without needed resources at hand.

Yes No N/A

5. The organization uses due diligence when approaching new challenges or opportunities.

Yes No N/A

6. The organization understands the importance of crossing boundaries, as appropriate, between the public, private, and nonprofit sectors.

Yes No N/A

7. The community it serves trusts the organization.

Yes No N/A

8. The organization communicates candidly with organization staff, customers, and the community.

Yes No N/A

9. The community, the organization staff, and the customers of the organization hold its leaders in high esteem.

Yes No N/A

10. The organization invests resources in professional development for management, staff, and volunteers.

Yes No N/A

11. Leaders are active in and hold leadership positions in other community or professional organizations at the local, state, and national levels.

Yes No N/A

V. Outcomes-Oriented Organization Indicators

1. The organization recognizes the importance of incremental achievement.

Yes No N/A

2. Procedures are in place to measure program and organizational outcomes.

Yes No N/A

3. The organization reviews the quality of services to generate improvements that will benefit clients.

Yes No N/A

4. A strategic plan guides the organization.

Yes No N/A

5. The organization evaluates outcomes in ways that are innovative and useful to guide decision-making by program leadership and funders.

Yes No N/A

6. The organization documents the connections between the mission and outcomes.

Yes No N/A

VI. Adaptable Organization Indicators

1. The organization can identify major changes it has made within the past several years to meet changing community needs.

Yes No N/A

2. The organization analyzes whether and how the changing environment can work to its advantage.

Yes No N/A

3. Continuous innovation and learning prevail throughout the organization.

Yes No N/A

4. Technology is current and appropriate to services provided.

Yes No N/A

5. Programs are reviewed on a regular basis to ensure that the current needs of customers are met.

Yes No N/A

6. The organization uses partnerships, strategic alliances and collaborations to leverage opportunities.

Yes No N/A

7. The organization plans for the future for its competitive advantage.

Yes No N/A

8. The organization acknowledges its links to the past, its responsibility to look toward the future, and changes it has made in response to community needs.

Yes No N/A
