IDEAS HUB WORKSHEET

Operational Capacity Self-Assessment

Understanding your operational capacities can help you set goals that will help you develop a more balanced, healthy organization and increase your ability to make an external impact.

1: Prepare for the assessment.

Set up the assessment in either a web-based or paper-based version to allow for anonymity. You can customize some of the questions or create new ones.

2: Take the assessment independently.

Take the assessment yourself. This will help you identify who else would be good to ask.

3: Gather key folks.

Identify 10-20 individuals who work with the organization as administrative or artistic staff (employees or contractors), board members, or volunteers. Send an initial email request to the people on your list. Be sure to communicate a deadline for completion.

4: Collect assessments.

Compile responses submitted by your staff, board, and volunteers. Create a report showing average scores for each question, as well as average scores for each section.

5: Review results as a team.

Hold a meeting with your planning team to review and interpret the results and identify further questions or goals for your work. See separate downloadable meeting agenda for conversation guide.

Please identify your role(s) within this organization.

☐ Board   ☐ Staff   ☐ Volunteer   ☐ Artist

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On a scale of 1-4, rate your agreement with the following statements:

Strategic Focus	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
We have a clear, concise mission statement that communicates its reason for existence, and is known broadly inside and outside of the organization.					
We have a compelling vision that communicates what we aspire to accomplish and it is known broadly inside and outside of the organization.					
We have a set of articulated values or guiding principles that define it and are key to our functioning and decision-making.					
We know its strengths and unique advantages and builds upon these to create a stronger future.					
We have a current written strategic plan, approved by the Board of Directors, with clear and agreed-upon long term goals to set direction.					
Our strategic plan is revisited at least annually and adapted to meet changing circumstances both within we and in the broader community served.					
Our strategic goals and objectives are understood throughout the organization and used to guide decision making at all levels.					

Mission & Focus	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
We have a clearly defined programming vision that aligns with the needs and interests of its clearly defined target audience(s).					
All of our programs are based on clear community needs and are responsive to evolving community needs; gaps are assessed to determine these needs.					
We ask for and receives feedback from its target community about their experiences of and perceived barriers to programming, and acts upon that feedback.					
Our program venues are inviting and accessible to target audiences.					
When applicable, we effectively collaborate in developing and implementing programs that advance the missions of each collaborating organization.					
Programming plans are inspired by our mission, vision, and values.					
Programming plans are realistic given our operational needs and capacity.					

Relationships & Relevancy	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
We understand what might influence different audiences' decisions to participate and we use this knowledge to inform outreach and program planning. We have strategies to deepen its current participants' level of involvement in the organization, through enriched experiences or opportunities for involvement.					
We have strategies to attract participants like those already participating in the organization through a variety of activities to broaden involvement.					
We have strategies to reach new audiences, including those from previously marginalized population groups, in an effort to diversify participation. We are strategic about forming partnerships to increase participation in its programs. Programming is designed with a goal of removing barriers, such as cultural, economic, accessibility, educational, and transportation.					
Our strategic planning considers changing community demographics and needs.					
We have a wide circle of contacts from the community that we can call upon for support in building the identity of the organization. We are known within the community and perceived as actively engaged with and responsive to the community.					

Infrastructure & Finance	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
We have a financial plan that forecasts financial requirements at least 2-3 years into the future. Realistic yet demanding targets exist for resources tied to organizational strategic goals. We have an annual budget in place that reflects the organization's strategic and operating goals. The budget is reviewed and approved by the board in advance at the beginning of each fiscal year.					
We are funded through a diverse mix of contributed income (public, foundation, corporate, and individual) and earned income.					
Our challenging yet achievable annual fundraising goals are set & reviewed at the end of each fiscal year.					
Our realistic plans are developed regarding potential staffing needs, tied to strategic planning, including planning for succession or transitions of staff. All staff receive training or professional development to stay up-to-date and expand their capabilities.					
Staff members have annual work plans with clear and challenging goals, linked to the organization's strategic goals. Staff members are evaluated in writing regularly against goals agreed upon in their work plan.					

Someone is responsible for human resource management, including legal obligations and appropriate compensation of all personnel.					
We have a written communications strategy and plan with key messages, target audiences, and approaches to delivery.					
Physical space is adequate for the current needs of our organization. Infrastructure is maintained and does not limit effectiveness.					
We recruit and manages volunteers systematically and assigns responsibility to specific people to manage and provide volunteers with meaningful work.					
Software and reporting systems are utilized to track financial information, program outcomes, clients, and volunteers. Systems are up-to-date.					
Funds are set aside for facility maintenance and technology upgrades; routine maintenance and technology upgrades are a part of organizational culture.					
Artist fees, salaries, and benefits are at a level appropriate for your industry and they communicate respect for artistic expertise and encourage allegiance.					

Leadership & Culture	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
We embrace a culture of learning, with processes in place to support knowledge sharing and the incorporation of diverse perspectives from inside and outside the organization. We have systems in place to track its progress and input from various stakeholders. Evaluation is a part of our organization's culture and is used regularly in program, financial, and organizational planning.					
Staff and board members understand our business model and have the opportunity to share and discuss meaningful and timely financial information.					
Our board has an adopted set of bylaws, a committee structure, and defined roles and responsibilities for each member.					
New board members are given a thorough orientation to we, the board, and their governance responsibilities—legal, fiduciary, and strategic. Our board is representative of the community and alert to changing community needs and realities.					
Attendance at board meetings is consistently high.					
Our board works with the executive director to set goals for the executive that are strategic, and the board assists the executive director in achieving them.					

Our board works outside of board meetings to advance the organization in achieving strategic objectives.					
Our board consistently acts as a strategic resource, demonstrating commitment to the organization's success, mission, vision, and values by establishing performance targets and evaluation benchmarks.					
The relative roles of the board and staff are defined, and boundaries are respected, with the executive director as operations manager and the board focused on policy, planning and fiduciary oversight.					