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How Healthy Is Your Organization? A Self-Assessment Instrument

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The following assessment has been designed to facilitate reflection and dialogue on your organization's current state of health and to surface areas that would benefit from attention. In the interest of user-friendliness, no effort has been made to make the instrument exhaustive or detailed. Thus, a very simple three-point scale has been used, rather than the five and 10 point scales used to achieve greater analytical precision. The assessment should be used as a helpful "mirror" of sorts, held up to the organization to reveal strengths as well as areas in need of improvement. It should *not* be used as an infallible or authoritative instrument to reveal the precise level of health within an organization.

Once you have checked the box that best describes your assessment of the organizational dimension in question, please proceed to the next question. When you are finished, return to the beginning of the instrument and circle the corresponding scores for each answer. Then, tally your score and read the evaluations in the box on the last page. If multiple individuals from the same organization have taken the assessment, you may wish to compare and discuss evaluations at an appropriate time, noting points of agreement as well as points of divergence in your assessments.

<u>Score</u>	<u>Directional Clarity and Intensity</u>
	1. How clearly does everyone in the organization understand the mission (purpose, <i>raison d'être</i>) of the organization?
0	<input type="checkbox"/> Some would be foggy
1	<input type="checkbox"/> Most would be fairly clear in their understanding
2	<input type="checkbox"/> Everyone would be very clear in their understanding
	2. Each department or major functional area in the organization has a very clear understanding of its respective mission.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	3. Every staff member can do a "parking lot talk" on a compelling vision for the organization (i.e, between the office and the parking lot, they can articulate in their own words the desired future of the organization).
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	4. The organization has an up-to-date, user-friendly strategic plan that is regularly used by leadership and management (i.e., it has real life versus just normal shelf life).
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	5. Leadership and management are clear on the core values of the organization and these values find expression daily in the work of organizational staff.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	<u>Customer/Stakeholder Focused</u>
	6. The organization is passionately customer focused and holds the needs of stakeholders (clients, customers, donors) to be more important than the requirements of internal operations.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	7. How often does the organization conduct empirical research to determine the needs, desires, and expectations of its key customer or stakeholder groups?
0	<input type="checkbox"/> Never
1	<input type="checkbox"/> Occasionally (e.g., every 3 – 5 years)
2	<input type="checkbox"/> Regularly (e.g., every 1 – 2 years)

<p>0 1 2</p>	<p>8. The organization has empirical knowledge of the key drivers of satisfaction for stakeholders and consistently uses this knowledge to plan and manage stakeholder programs and communications.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p>0 1 2</p>	<p>9. Senior managers in the organization understand the criticality of stakeholder loyalty and have actionable metrics (i.e., a “scorecard”) for planning, managing, and evaluating satisfaction and loyalty programs.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p><u>Entrepreneurial/Opportunity Focused</u></p>	
<p>0 1 2</p>	<p>10. As resources permit, the organization relentlessly pursues mission/ vision-related opportunities aligned with its core competencies (and conversely does not pursue opportunities where it does not possess strengths).</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p>0 1 2</p>	<p>11. The organization emphasizes the pursuit of mission-related opportunities more than solving organizational problems.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p><u>Board of Directors</u></p>	
<p>0 1 2</p>	<p>12. Which description best fits your organization’s board of directors?</p> <p><input type="checkbox"/> Essentially custodial and largely reactive. No apparent strategic criteria or process for member recruitment. <input type="checkbox"/> Pretty much your average board. Neither real helpful nor a hindrance. Conventional criteria used for recruitment. <input type="checkbox"/> Board is strategic and proactive in the way they add value to the organization. Criteria unique to the organization’s mission and current strategy drive recruitment and board management.</p>
<p>0 1 2</p>	<p>13. Board members are willingly involved and active in identifying, cultivating, and encouraging the involvement of prospective donors to the organization.</p> <p><input type="checkbox"/> Almost never <input type="checkbox"/> Sometimes <input type="checkbox"/> Regularly</p>

	14. A healthy balance exists between the “3 Ws” on our board: wealth, work, and wisdom.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	<u>Fiscal Affairs</u>
	15. Does the organization have a formal budget derived from an annual operating plan?
0	<input type="checkbox"/> No formal budget exists.
1	<input type="checkbox"/> A budget exists, but it is prepared prior to or apart from the annual operating plan.
2	<input type="checkbox"/> The budget is derived annually from operating plans and reflects a strategic allocation of organizational resources.
	16. A finance committee of the board regularly reviews the organization’s finances and insures adherence to sound fiscal policies, procedures, and controls.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	17. Does your organization make certified financial audits available to the public?
0	<input type="checkbox"/> No such information is available.
1	<input type="checkbox"/> Audits are available but only to organizational supporters.
2	<input type="checkbox"/> Audits are prepared annually and are available to the public on request.
	<u>Organizational Structure</u>
	18. What is the relationship of your organizational structure to your strategy and operations?
0	<input type="checkbox"/> Structure dictates strategy and operations and is largely unresponsive to changes in strategy and our operating environment.
1	<input type="checkbox"/> Operations are aligned with our strategy, but structure remains essentially unchanged.
2	<input type="checkbox"/> Strategy dictates operating plans <i>and</i> organizational structure, and both are changed as needed to respond to new opportunities and challenges.
	19. How widely is decision making authority distributed throughout the organization?
0	<input type="checkbox"/> Poorly. Only the CEO has authority to make important decisions.
1	<input type="checkbox"/> Fairly well-distributed. Managers have authority to make important decisions in their areas.
2	<input type="checkbox"/> Widely distributed. Managers and supervisors at all levels of the organization have the authority to make decisions regarding their areas of responsibility.
	20. The organization is relatively “flat” with no unnecessary levels of management.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree

<p>0 1 2</p>	<p>21. The organization is largely organic and “boundaryless” with high levels of inter-departmental and cross functional collaboration, rather than functioning in mechanistic “silos.”</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p>0 1 2</p>	<p>22. Leadership understands the vital importance of “job fit” and consistently strives to create jobs in which individuals can “soar with their strengths.”</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p><u>Teams</u></p>	
<p>0 1 2</p>	<p>23. Cohesive teams exist throughout the organization in which members know their strengths and weaknesses and constructive conflict of ideas and opinions is encouraged.</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p>0 1 2</p>	<p>24. Teams are characterized by participative leadership and shared responsibility, with team members holding each other accountable for behavior and results.</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p>0 1 2</p>	<p>25. Team meetings are focused on task and are frequently passionate and intense, rarely boring.</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p><u>Employee Engagement and Commitment</u></p>	
<p>0 1 2</p>	<p>26. Job designs for all positions are clear and all employees clearly know what is expected of them.</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>
<p>0 1 2</p>	<p>27. Employees throughout the organization have the materials, equipment and tools to do what is expected of them.</p> <p>[] Disagree [] Somewhat agree [] Strongly agree</p>

<p>0 1 2</p>	<p>28. In their jobs, staff regularly have opportunities to do what they do best.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p>0 1 2</p>	<p>29. Employees regularly have opportunities on the job to learn and grow.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p>0 1 2</p>	<p>30. At least monthly, individual staff receive recognition and praise for doing a good job.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p><u>Marketing</u></p>	
<p>0 1 2</p>	<p>31. Does management recognize the importance of customizing a variety of programs and services to meet the identified needs of different stakeholders?</p> <p><input type="checkbox"/> Management is really sold on its own programs and feels that constituents will one day discover their true importance. <input type="checkbox"/> Management occasionally thinks about constituents' needs and weighs these needs in program planning. <input type="checkbox"/> Management thinks constantly about the needs, wants, and expectations of specific stakeholders and weighs these heavily in program planning.</p>
<p>0 1 2</p>	<p>32. Does management design, develop and offer customized programs for various stakeholders or market segments based on needs identified through research?</p> <p><input type="checkbox"/> Rarely <input type="checkbox"/> Occasionally <input type="checkbox"/> Regularly</p>
<p>0 1 2</p>	<p>33. Does management recognize the "80/20 Principle" in its marketing planning and programming?</p> <p><input type="checkbox"/> Management is essentially egalitarian and feels that all stakeholder groups should be treated as equally important. <input type="checkbox"/> Management feels that some stakeholders and programs are more important than others and tries to reflect this in its planning and programming. <input type="checkbox"/> Management understands clearly the importance of "the critical few" and preferentially allocates resources accordingly.</p>
<p><u>Market Research</u></p>	
<p>0 1 2</p>	<p>34. When did the organization last conduct any market research or constituency analysis?</p> <p><input type="checkbox"/> Never <input type="checkbox"/> 3 to 5 years ago <input type="checkbox"/> Within the last 2 years</p>

	35. How effectively does your organization incorporate its market research findings into its marketing strategy and programming?
0	<input type="checkbox"/> Not very effectively. Research is largely an academic exercise and is rarely applied in practical ways. It has great shelf life but no real life.
1	<input type="checkbox"/> Somewhat effectively. Findings are used from time to time in strategy and program design.
2	<input type="checkbox"/> Very effectively. Research findings play a major role in formulating strategy and designing programs.
	36. How would you evaluate the quality of your organization's current marketing strategy?
0	<input type="checkbox"/> Current strategy is unclear or misguided.
1	<input type="checkbox"/> Current strategy is clear but outdated, largely a continuation of historic practices.
2	<input type="checkbox"/> Current strategy is clear, shaped by research, and carefully evaluated in terms of effectiveness and impact.
	37. How widely is the marketing plan shared among those with a need to know?
0	<input type="checkbox"/> Very few people are aware of the plan.
1	<input type="checkbox"/> Top managers are familiar with the plan.
2	<input type="checkbox"/> Everyone with a need to know understands the major elements of the plan.
	<u>Development</u>
	38. A written development plan exists with project designs or plans for all significant programs and activities.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	39. Development staff have significant tenure (at least several years) and staff turnover is minimal.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	40. The organization has comprehensive, diversified development programming including current, capital, and planned giving.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree
	41. Growth in key indicators of development performance (total income, net income, # of donors, donor retention, average annual giving) has been steady if not impressive.
0	<input type="checkbox"/> Disagree
1	<input type="checkbox"/> Somewhat agree
2	<input type="checkbox"/> Strongly agree

<p>0 1 2</p>	<p>42. The board of directors, CEO and management team are all very supportive of development efforts if not actively involved.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p><u>Culture, Climate, and Communications</u></p>	
<p>0 1 2</p>	<p>43. The culture of the organization is one in which board members, staff and volunteers are consistently affirmed and recognized for their contributions.</p> <p><input type="checkbox"/> Disagree <input type="checkbox"/> Somewhat agree <input type="checkbox"/> Strongly agree</p>
<p>0 1 2</p>	<p>44. How freely is information shared within your organization?</p> <p><input type="checkbox"/> Very little. People at the top share little information and control its dissemination very carefully. <input type="checkbox"/> Fairly freely. Information is shared with most workers periodically. <input type="checkbox"/> Very freely. An openness to sharing relevant information characterizes the organization and nearly everyone is well-informed.</p>
<p>0 1 2</p>	<p>45. Are difficult problems openly confronted and resolved?</p> <p><input type="checkbox"/> Rarely. Difficult issues are often avoided because of how they might be received. Polite avoidance masks the real issues for fear of "what the boss might think." <input type="checkbox"/> Somewhat. Difficult issues are occasionally addressed but with considerable anxiety and reluctance. <input type="checkbox"/> Yes. Difficult issues are openly confronted in an atmosphere of trust and mutual support.</p>
<p>0 1 2</p>	<p>46. How well is conflict managed within the organization?</p> <p><input type="checkbox"/> Not well. Conflict is covert and managed by politics and games. <input type="checkbox"/> Fairly well. Conflict is understood as being unavoidable and people largely speak their minds. <input type="checkbox"/> Well. Conflicts are considered important to decision making, personal and organizational growth. People say what they think and expect others to do the same.</p>
<p>0 1 2</p>	<p>47. What is the quality of relationships within the organization?</p> <p><input type="checkbox"/> Not so hot. Relationships are contaminated by maskmanship, turf protection, and an undercurrent of fear. <input type="checkbox"/> Fair. Relationships are fairly open and caring. <input type="checkbox"/> Good. Relationships are honest and people really care about each other.</p>
<p>0 1 2</p>	<p>48. How open is the organization to innovation and change?</p> <p><input type="checkbox"/> Closed door. Tradition, tradition, tradition. <input type="checkbox"/> Fairly open. New ideas, concepts and systems are considered frequently. <input type="checkbox"/> Very open. Old methods are frequently questioned and occasionally discarded. Innovation is encouraged.</p>

	<p>Metrics/Information Systems</p> <p>49. Does management have a strong orientation towards results?</p> <p>0 <input type="checkbox"/> No. Activity is confused with accomplishment. Very little management against specific objectives.</p> <p>1 <input type="checkbox"/> Somewhat. Goals and objectives exist, but systems are lacking to monitor performance against objectives.</p> <p>2 <input type="checkbox"/> Yes. Management by results and clear metrics pervade the organization. Results are regularly measured and corrective action is taken where needed.</p> <p>50. How adequate/responsive are information systems to staff needs for timely and accurate information on program and operational performance?</p> <p>0 <input type="checkbox"/> Systems are severely limited in scope, user-friendliness and timeliness.</p> <p>1 <input type="checkbox"/> Fairly adequate and responsive. Data are accurate, formats and access are user-friendly, and information is timely.</p> <p>2 <input type="checkbox"/> Very. Accurate, reliable, and timely information is available in a user-friendly way.</p>
___	Total Score

Total Score

Score Range	Color	Assessment
80 – 100	Green	Good to outstanding. Likely a very strong organization accomplishing significant results. Also very likely a great place to work.
60 – 80	Yellow	Some things are good, but other areas are in need of significant attention to be competitive.
40 – 60	Orange	Poor to fair. Some areas may be strong, but overall performance is likely mediocre. Soft spots could become critical if not corrected.
20 – 40	Red	Very substantial problems with the possibility of a crisis looming. Survivability long-term is questionable if a turnaround is not achieved.
Below 20	Black	The organization is in crisis. Unless the organization is in a start-up phase, viability is very much in doubt.

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