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Organizational Self-Assessments

Self-assessments are often the first step in an organization's journey toward effective outcomes. The goal of assessments is to collect data that can help the nonprofit evaluate whether or not it is making progress toward various goals and help the nonprofit demonstrate that it is advancing its mission.

Organizations that are serious about measuring their progress and evaluating their outcomes typically engage in a self-assessment process, whether organization-wide or focused on certain aspects of their programs or activities. For example, board members can conduct self-assessments to determine how engaged the board is, or to identify knowledge or experience gaps.

Practice Pointers

- Diverse perspectives can affect the ways in which individuals react to self-assessments. As a preliminary step it might be useful to discuss how diverse perspectives may impact the process, so that goals of inclusiveness are taken into consideration both when designing the assessment and when interpreting the results.
- Self-assessments can help boards and staff more quickly identify areas in which your organization can improve its effectiveness to serve its mission. While individual staff or board members may feel uncomfortable with self-

assessments, reinforcing how assessments are directly tied to advancing the mission may help them become more comfortable participating in self-assessments
- If your nonprofit receives funding from private foundations, don't be shy about asking whether the grantmaker recommends a particular self-assessment tool or evaluation process. Some grant reports have specific questions for the grantee to address that ask about the process the organization uses to measure its outcomes or progress.

Related Insights & Analysis

- Evaluation and Measurement of Outcomes
- Self-assessments for nonprofit boards
- What Is Capacity Building?

Additional Tools and Resources

- A guide to organizational capacity assessment tools (William & Flora Hewlett Foundation)
- The Ford Foundation’s Organizational Mapping Tool (OMT) is an open-source organizational assessment tool designed to help nonprofits identify and prioritize their organizational strengthening or capacity-building needs. The tool is available at no charge, but the process is best done with one person who is not an employee or board member leading as a facilitator. (Note: the OMT is available in seven languages, and there is a version for coalitions, alliances, and networks.)
- Self-Assessment Checklist (Free Management Library)

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