

Appendix C:

Assessment

An assessment can help you and your organization determine whether the process described in the guide is a good match for your organization—and where to begin.

Who should participate in the assessment?

The assessment is designed for the leadership and staff members of an organization where there is interest in pursuing social change work. However, not every staff member in such an organization needs to complete the assessment. We suggest that a group of people in the organization complete the assessment form. This group can be made up of persons who volunteer to be a part of the group, the individuals who are participating in the learning and changing process, or a group chosen by the staff who are leading the change effort. Once the assessment forms are collected, you can then discuss the results together, as detailed below.

How do we take the assessment?

Hand out copies of the assessment to each respondent and ask each person to keep track of his or her answers on their worksheet. For each question, the respondent is to choose the multiple-choice answer that most accurately reflects the organization. Once the respondent has completed the assessment, s/he should count up the answers to determine their score. Respondents should be informed that since every organization is different, it's likely that no single answer will perfectly describe your agency—respondents should simply select the answer that fits best.

Once everyone has completed the assessment and scoring process, the assessments can be turned in anonymously. The scores will almost certainly vary among the individual participants in any given group. The facilitator can average all the scores together (for a single collective score) or simply acknowledge the range of scores within the group. Either way, the scores can help your group to choose a starting place for using this guide.

Once the assessments are in hand, the facilitator can also lead a brief discussion on the scoring totals and any surprises in the assessment responses. The idea is not to get too “caught up” in analyzing the assessment findings, but rather to use these findings to guide the organization’s “next steps” for incorporating a social change component into its overall work.

Part 1: Vision, mission, and the theory of change

1 Does your organization have a written mission statement?

- A) No, our organization does not have a written mission statement.
- B) Yes, our organization has a written mission statement, but I don't really know what it is or how it applies to our work.
- C) Yes, our organization has a written mission statement; I know what it is but I don't think it really guides our work.

D) Yes, our organization has a written mission statement that guides our work; staff and board understand the mission.

2 Does your organization have a vision statement? (A vision statement is a description of the world that your organization wants to help create.)

A) No, we don't have a written vision statement, and we have never talked about our vision.

B) No, we don't have a written vision statement, but we talk about our vision. However, there doesn't seem to be any overall agreement among staff and board members about the vision.

C) Yes, we have a written vision statement, and I know what it is but I don't think it really guides our work.

D) Yes, we have a written vision statement that guides our work; staff and board understand the vision.

3 Does your organization evaluate how your activities advance the mission and/or vision?

A) Unless something is obviously going wrong, we assume that our activities are working.

B) Our program staff and their supervisors evaluate their programs. These evaluations do not reference our agency's mission or vision, and are often dictated by funders' guidelines or grant proposals.

C) Our programs are routinely evaluated based on our agency's goals and anticipated outcomes,

which stem from our mission or vision. However, we rarely discuss the results of these evaluations.

D) We set goals and strategies that reference our agency's mission or vision. Programs are routinely evaluated and we discuss the results among ourselves and with others in the organization. We then make changes in the program based on our mission/vision, and on the evaluation results.

Part 2: Leadership for change

1 The organizational structure and decision-making process within your agency can best be described in the following way:

A) The director and/or board of directors make most of the decisions.

B) The director regularly consults with staff and constituents, but there is no formal leadership structure with decision-making power beyond the director and the board.

C) The director consults with staff and constituents. We are working on developing a more formal power-sharing process.

D) Decision-making structures and accountability are clear, and power is formally shared among people at different levels of the organization.

2 How do your organization's leaders reflect the communities you serve? ("Leaders" refers to senior staff and other staff with significant decision-making authority and autonomy, as well as the board of directors.)

A) Our organization's leadership does not reflect the community we serve in terms of race, ethnicity, economic status, gender, age, etc. There is little interest in recruiting, developing, or promoting leadership that reflects those we serve.

B) Our organization's leadership does not reflect the community we serve. The organization has tried to change this through diversity training or other efforts, but with little success.

C) Our organization's leadership is not fully reflective of our community, but it is more reflective than it has been in the past. The organization is consciously working to address this issue.

D) Our leadership (or organization) reflects and is representative of the communities we serve. We have ongoing, well-developed procedures in place to recruit and develop leaders from the community.

3 How do clients/constituents participate in your organization?

A) Our clients/constituents receive services, but do not have any say in the services they receive or the goals of the organization.

B) We are interested in feedback and periodically ask clients/constituents for their opinions or feedback through surveys, evaluations, comment cards, or meetings. However, this process is not consistent and there is no structured way for clients/constituents to have a say in how the organization operates.

C) We get feedback from clients/constituents in different ways and take that feedback into account when we evaluate our agency's work. We

have tried to bring constituents into leadership roles (such as board members), but we haven't done it consistently and when we have done it, the results have not gone very well.

D) Clients/constituents successfully participate in our organization at every level, from giving feedback on services to serving on committees, leadership groups, and the board of directors.

4 Does your organization work with clients/constituents for social change?

A) We provide services only; the organization does not seem interested in doing social change work, such as advocacy or teaching our clients/constituents about their rights.

B) Our organization is interested in social change but is afraid that if we speak up it will jeopardize our ability to do our work. We do belong to coalitions that advocate to prevent funding cuts to our organization.

C) Our organization has been active in several issues affecting our clients/constituents and keeps us informed about what is going on in that arena. Mainly, the executive director and a few senior leaders are involved in this effort.

D) Our organization has been active in social change work and its activities include and are led by constituents who have had leadership training on how to do this work. We are regularly informed and updated on progress in this area, and are encouraged to participate and to include our clients/constituents in these efforts.

Scoring the assessment

Score each section separately, as your score in each section will help you identify where to begin your efforts. For each of the following answers, give yourself the following score:

A – 0 B – 1 C – 2 D – 3

Part 1:

Mission, vision, and the theory of change ____

Part 2:

Leadership for change ____

Total Score: _____

What your score means

Low Score: 0–7

You have a ways to go to incorporate social change strategies. But don't worry; many service organizations will score at this level, so you're in good company. Nonprofit organizations get little (if any) support to do social change work, and for the past two decades nonprofit managers have come under increasing pressure to run their organizations like businesses, despite growing evidence that this approach is not working for clients or communities. We suggest you start with Chapter 1 of the guide and work your way through the entire process.

Midrange Score: 8–15

You're well on your way, and probably already doing some of the things suggested in this guide. What you are already doing well will help you implement other ideas. If you or others in the organization have attempted to make change without much success, you may feel discouraged. This guide will offer fresh approaches to

problems that you have already started to learn from. We suggest you focus your efforts on the area where your scores were lowest. If your score in Part 1 was low, you may want to browse Chapters 1 and 2 before moving on to Chapter 3. If your score in Part 2 was low, you'll probably want to focus on Chapters 4 and 5. In any case, it is important to remember that the process of reflection and evaluation, as detailed in Chapter 6, should always be a part of this cycle, no matter where you start.

High Score: 16–21

Your organization is probably in great shape! You are already making use of many social change strategies. We believe that working for change is a constant process, and all of our organizations can benefit from continual growth and development. We hope the materials in this guide will serve as useful tools to help you further articulate and strengthen your social change work, as well as address the funding and political challenges that can arise from taking on such work.