

Organisational Healthcheck– Criteria for Self-assessment

<u>HEALTH CHECK</u>	At Risk (1)	Vulnerable (2)	Viable (3)	Sustainable/Successful (4)	Thriving (5)
Governance <i>Overview</i>	<ul style="list-style-type: none"> • Purpose not clearly linked to community needs & requests • Hostile staff / board relationship • Board interferes with operational decisions 	<ul style="list-style-type: none"> • Not much community input; no clear response to this • Lack of understanding re staff / board responsibilities for decision making; rubber stamp approvals 	<ul style="list-style-type: none"> • Community input limited to AGM; reactive review of goals • Emergence of staff and board responsibilities, but decision making inconsistent 	<ul style="list-style-type: none"> • Interaction with community at AGM & through networks; • outside prompts lead to goal review • Responsibility for decision making mostly clear; some grey areas remain; medium level of trust between staff & board 	<ul style="list-style-type: none"> • Visionary; pro-active interaction with community; • Regular self evaluation of goals • Clear decision making processes; high level of trust between staff & board; strong trustee contribution
Roles <i>Who does what</i>	<ul style="list-style-type: none"> • Lack of understanding of different roles within the organisation • Conflict exists over role boundaries; 	<ul style="list-style-type: none"> • Some members of the organisation have a basic understanding of roles • No role clarification has taken place 	<ul style="list-style-type: none"> • Main roles are defined, but no clarity on how to manage boundaries. • Roles are not always matched to skills of person 	<ul style="list-style-type: none"> • Clear roles for staff, trustee roles within the board follow tradition & could be better defined. • Induction and skills match for staff but not for board members 	<ul style="list-style-type: none"> • Clear roles throughout the organisation. • Ongoing review of roles and responsibilities. • Induction for all staff, including board and volunteers, skills matched with roles.
Administration <i>Keeping track</i>	<ul style="list-style-type: none"> • No clear administration processes in place 	<ul style="list-style-type: none"> • Limited administration processes in place • Ad hoc use of processes, often as a reaction to requirements from outside 	<ul style="list-style-type: none"> • Basic administration processes in place • Processes not well known and not always adhered to 	<ul style="list-style-type: none"> • Administration processes in place and followed • Processes are restricted to those required by law and/or contract agencies 	<ul style="list-style-type: none"> • Administration processes are aimed to get best quality output • Processes are clearly understood and followed • All processes reviewed regularly

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Financial Management <i>Where's the money?</i>	<ul style="list-style-type: none"> No clear financial procedures in place Ad hoc spending, not always related to purpose of funds No audited accounts 	<ul style="list-style-type: none"> Ad hoc finance planning; incomplete finance systems in place Most activities financially stressed; Totally grant dependent Audit challenges current practises & requests significant changes 	<ul style="list-style-type: none"> Limited finance planning; basic finance systems; information limited Some activities financially stressed; mostly grant dependent Qualified audit report; some changes required 	<ul style="list-style-type: none"> Finance planning to budgets; extensive finance systems, information mostly accessible Less grant dependent, most activities well resourced Audit requests minor changes 	<ul style="list-style-type: none"> Long & short term finance planning to budgets/cashflows; excellent systems & clear information Aims for financial self sufficiency, all activities well resourced Unqualified auditors report; no changes required
Meeting Legal Obligations <i>What we have to do</i>	<ul style="list-style-type: none"> Lack of knowledge of requirements Non compliance evident in some areas Accountability lacking 	<ul style="list-style-type: none"> Limited knowledge of requirements Compliance checks show gaps Accountability inconsistent 	<ul style="list-style-type: none"> Awareness of most requirements, lack of in depth knowledge Mostly compliant, smaller gaps Accountable in most areas 	<ul style="list-style-type: none"> Basic information available on all areas of compliance Compliant to minimum requirements Accountability evident on request 	<ul style="list-style-type: none"> Pro-active integration of legal and contract requirements Exceeds expectations Demonstrates accountability
Evaluation <i>How are we doing?</i>	<ul style="list-style-type: none"> Hostile towards feedback Re-active action taken Evaluation seen as a threat or not relevant 	<ul style="list-style-type: none"> Value of evaluation not clearly understood Limited action in response to feedback 	<ul style="list-style-type: none"> Evaluation mostly informal and not documented Some quality improvement due to feedback 	<ul style="list-style-type: none"> Formal evaluation as required by outside agencies Feedback implemented as required by outside agencies 	<ul style="list-style-type: none"> Quality service through pro-active evaluation systems All feedback influences decision making & leads to improved quality
Planning <i>What's ahead?</i>	<ul style="list-style-type: none"> Low level of planning, lack of planning skills 	<ul style="list-style-type: none"> Reactive planning; response to finance pressure and/or negative feedback 	<ul style="list-style-type: none"> Mostly short term planning; decisions not always goal related; some activities outside chosen goals 	<ul style="list-style-type: none"> Short term & some long term planning in place; some progress towards goals measurable 	<ul style="list-style-type: none"> Regular short & long term planning that matches vision and goals; Clear progress towards goals evident

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Leadership	<ul style="list-style-type: none"> Struggle for leadership or absence of leadership Leadership is fully directive, no consultation, low levels of information 	<ul style="list-style-type: none"> Leadership fluctuates, lack of leadership skills Leadership partially informative, low levels of consultation 	<ul style="list-style-type: none"> Leadership carried by one strong person Leadership fully informative, building awareness of how & why; leader decides on levels & time of consultation 	<ul style="list-style-type: none"> Leadership is shared by a few strong people Leadership is consultative, many opportunities for input provided; input influences some decision making 	<ul style="list-style-type: none"> Leadership is shared throughout the organisation Leadership highly participative, pro-actively seeking input and adjusting decision making in response; effective role modelling
Communication <i>Who knows what?</i>	<ul style="list-style-type: none"> Low level of communication & skills and high level of distrust internally and externally IT access limited 	<ul style="list-style-type: none"> Medium level of communication and skills; fear of conflict; low cultural awareness IT use limited 	<ul style="list-style-type: none"> Medium level of trust, formal communication processes in place; limited skills re: conflict/ cultural needs Medium use of IT 	<ul style="list-style-type: none"> Formal & informal communication; apprehensive re conflict but ok, increased cultural awareness Many people use IT 	<ul style="list-style-type: none"> Pro-active & effective in regards to communication, cultural needs & conflict IT highly effective
Partnership <i>Working together</i>	<ul style="list-style-type: none"> Organisation intensely competitive, totally disinterested in partnerships 	<ul style="list-style-type: none"> Lack of interest & commitment to partnerships; rarely engages in cooperative action 	<ul style="list-style-type: none"> Organisation willing to consider partnerships, but easily discouraged 	<ul style="list-style-type: none"> Organisation responds positively to partnerships, but rarely initiates 	<ul style="list-style-type: none"> Organisation models a win: win approach and is proactively seeking partnerships & alliances
Staff (paid and volunteer) <i>Our people</i>	<ul style="list-style-type: none"> Staff (paid and volunteer) not valued No support systems and training in place No consultation of staff re decision making and little information about decisions made 	<ul style="list-style-type: none"> Treatment of staff (paid & volunteer) is inconsistent Limited Training available on request; no clear support systems Consultation is often informative, i.e. after decisions have been made 	<ul style="list-style-type: none"> Staff (paid & volunteer) valued, but high expectations for low return; staff roles unclear Some training, often decided without staff input; basic support available Informal consultation on upcoming decisions 	<ul style="list-style-type: none"> Staff (paid & volunteer) valued, achievable expectations and fair return; roles clearly defined Regular training with input by staff on needs; Support systems formalised Opportunities for input in decision making 	<ul style="list-style-type: none"> All staff highly valued, rewarding working conditions; clear roles Training supports long term career goals of staff; comprehensive review and support systems in place Staff invited to full participation in organisational development & decision making

Organisation Summary Sheet

	At risk (1)	Vulnerable (2)	Viable (3)	Sustainable /Successful (4)	Thriving (5)
Governance/Te Roopu Kaitiaki					
Roles					
Administration					
Financial Management					
Legal Obligations					
Evaluation					
Planning					
Leadership					
Communication					
Partnerships					
Staff					

Now take your scores and map on the matrix below



You have now established the bench mark of the health of your organisation for future evaluation.