

Organizational Support Assessment

To conduct this assessment you will need to complete some questions and you will also need to talk through some questions with leaders in your organization who have a clear sense of how your program fits within the whole of the organization. Go as "far up" the chain of command as you can to get your responses.

Key Assessment Question	Your Response to Assessment Question
Is your program being successful? That is, is it achieving its goal, objectives, and outcomes?	
How do you know the program is being successful? What data do you have indicates programmatic success?	
How does the leadership of the organization perceive this program? What positives does leadership see? What negatives?	
If perception is negative, what does leadership suggest you can do to improve the perception?	
If perception is positive, does leadership view this as a program worth sustaining within the organization?	
Overall, how does the organization view this program?	

Program Cost Assessment

The program cost assessment has two parts.

First, complete the attached budget worksheet as best you can. To do this, you will likely find it useful to meet with the person in your organization that manages and/or oversees organizational budgets. In smaller organizations, this may be the Executive Director or CEO while in others it may be the financial director, CFO, or operations director. While you can get much of the information from a print-out or spreadsheet of your program budget that shows indirect allocations though a conversation with a financial leader will help clarify information on these documents. In completing this assessment, please use these two key assumptions: 1) your program will not substantially change once the grant cycle ends (this will give you a good idea of actual current costs), and, 2) you are planning "as if" the program will in full within your current organization.

Second, respond to the questions below.

<i>Key Assessment Question</i>	<i>Your Response to Assessment Question</i>
What is the total amount of money needed to continue the program as it is under your current organization after the grant cycle ends?	
Thinking about the conversations you had with leadership during the organizational support assessment and the budget discussions, what "intangibles" came to light that might affect future funding for the program in your organization?	
Is leadership willing to raise money or re-allocate budgets to retain the <u>full program</u> within the organization? If retaining the full program is not feasible, for which components do leaders feel money can be successfully raised to support and continue?	
Is leadership generally optimistic or pessimistic about the chances of raising sufficient funds to retain the program?	
Overall, what is your most realistic assessment of the organization's interest, capacity, and will to raise funds to sustain the program?	

Fundraising Options Assessment

By this stage of the assessment, you may have learned that you have the option of personally fundraising for the program. This is not the case in every organization. Some organizations have restrictions about who can raise funds, the type of funds that can be solicited, and who can be approached for a gift or contribution. If you are not certain whether it is acceptable within your organizational policies to act as a fundraiser for your program, be sure to ask. If you are allowed, make sure you know the policies, protocols, limitations and boundaries you will need to observe.

This part of the assessment can be completed by having a conversation with the person or persons with primary responsibility for fundraising in your organization. Sometimes that is the Executive Director or CEO, sometimes it is the development director and staff, and sometimes it is all of these.

<i>Key Assessment Question</i>	<i>Your Response to Assessment Question</i>
Does your organization allow you to act as a fundraiser for our program?	
If "no," what type of support and assistance can you provide to the person for program fundraising?	
If "no," how willing are the fundraisers and grant writers to take on the cause of raising new replacement funding for your program?	
If "yes," what limitations, policies, protocols, or boundaries do you have to observe?	
If "yes," what types of fundraising activities are you allowed to undertake?	
Overall, assess the feasibility of raising new funds for your program to replace those you will be losing at the end of the grant cycle.	

Core Elements Assessment

This part of the assessment leads you through a brief process of determining the core elements or components of your program that it is essential to continue and sustain. However, this assessment does not assume the program will continue under your current organization. You are determining the core elements or components that are essential to sustain whether within your organization or within another partner organization.

<i>Key Assessment Question</i>	<i>Your Response to Assessment Question</i>
What are the different components (e.g., educational programs, support groups, health services, etc.) of your program that could be "free standing?" That is, they could be offered independently from other program components?	
Participation: Which of these components have highest participation? What data and sources support this?	
Need: Which of these components are most needed?	
Need: How do you know these components are most needed? What data and sources support this assessment?	
Effectiveness: Which of these components are most effective?	
Effectiveness: How do you know these components are most effective? What data and sources support this assessment?	
Overall, in your judgment, what are the core elements of this program that are essential to continue for the well-being of the clients served by the program?	

Potential Partnership Assessment – *For use with external organizations but can be adapted and used for internal departments.*

In this part of the assessment you are asked to consider which current or potential partner organizations or groups are the best fit and have the interest and capacity to take on and continue core elements of the program. The starting point for this assessment is the website Guidestar.org. Guidestar is a website that is used by funders and philanthropists to assess organizations that may wish to support. When you first access the Guidestar website, you will need to create an account. This is a FREE account and it is not necessary to pay for a subscription to access the information you need. Once you have registered, you can search by name for an organization you want to learn more about. On the Guidestar website, you can read a profile of the organization. Then, you can download the organization's Form 990, which is a public document that non-profit organizations are required to file each year with the IRS. The Form 990 will provide you with a deeper look into the capacity of the organization. Use Guidestar to research organizations you are interested in offering core elements of your program. With very little effort, you can quickly learn your way around the online profiles and the Form 990s to learn more about the organization. This information will help you decide whether to make personal contact with them about your program as well as provide you with some useful information before your first meeting.

The following assessment grid allows you to respond to questions with regard to three different organizations, though you are welcome to consider more.

Key Assessment Question	Your Response to Assessment Question	
Organization #1 Assessment:		
Name of Organization:		
What core components are you considering for this organization?		
Fit: Based on what you have learned about the organization's other programs, how do you believe this component fits with them?		
Mission: Does this organization's mission support, or at least allow, for the core element to be implemented?		
Capacity and Resources: Based on your review of the organization's profile, and financial information on Form 990, does the organization <u>seem</u> to have sufficient current resources to offer the core element?		
Overall, how do you assess this organization as a candidate for offering this core program element?		

Organization #2 Assessment:	
Name of Organization:	
What core components are you considering for this organization?	
Fit: Based on what you have learned about the organizations other programs, how do you believe this component fits with them?	
Mission: Does this organization's mission support, or at least allow, for the core element to be implemented?	
Capacity and Resources: Based on your review of the organization's profile, and financial information on Form 990, does the organization <u>seem</u> to have sufficient current resources to offer the core element?	
Overall, how do you assess this organization as a candidate for offering this core program element?	

Organization #3 Assessment:	
Name of Organization:	
What core components are you considering for this organization?	
Fit: Based on what you have learned about the organizations other programs, how do you believe this component fits with them?	
Mission: Does this organization's mission support, or at least allow, for the core element to be implemented?	
Capacity and Resources: Based on your review of the organization's profile, and financial information on Form 990, does the organization <u>seem</u> to have sufficient current resources to offer the core element?	
Overall, how do you assess this organization as a candidate for offering this core program element?	