

Partners in Compassion

Application for Admission to the 2009 PIC Institute: Organizational Self-Assessment

Rate your organization's practices in the categories below using a scale: Needs a lot of work, Needs some work; Needs a little work; We do this well. You may also respond with NA- not applicable. You are encouraged to add notes to explain the score, but notes are not required.

Leadership	Leadership Practice	Rating	Notes for Rating
Mission	The organization has a clear purpose that guides decisions	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Planning	The organization develops comprehensive long-range and annual goals designed to achieve the organization's mission	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Board Membership	The board brings affiliations and expertise that represent the organization's constituents and ensures oversight for proper management of the organization	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Board Operations	The board is informed, knowledgeable and committed to fulfilling its roles and responsibilities	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Board Leadership	The board promotes the organization's leadership and management (i.e. the board sets the organization's priorities; board roles and authority are distinct from staff)	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	

Operations and Infrastructure	Practices Relating to Operations and Infrastructure	Rating	Notes for Rating
Personnel Management	Staff and volunteers have the support and guidance they need to fulfill their job responsibilities	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Performance Goals and Review	Staff and volunteers know what to do and how well they are meeting expectations	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Budgeting	The budget conveys the organization's financial status in terms of anticipated expenditures and revenues	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Financial Recordkeeping	Guidelines and procedures for responsible handling of finances are written and followed	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Financial Reports	The organization's leaders analyze revenue and expense activity to manage the organization's finances	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Financial Accountability	The organization assures accountability for the funds it receives. Internal processes are monitored to prevent errors	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Technology-Communication	Technology supports internal and external communications (i.e. staff have access to phones, faxes, copy machines)	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Technology-Hardware and	Technology helps staff and volunteers handle administrative and program tasks in an	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work;	

Operations and Infrastructure	Practices Relating to Operations and Infrastructure	Rating	Notes for Rating
Software	accurate and timely manner	<input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Technology-Skills	Staff and volunteers know how to use available technology	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	

Program Development	Program Practices	Rating	Notes for Rating
Program Design	Programs are designed to further the organization's mission and address clearly defined needs	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Program Design	Data are gathered and used to inform program modifications or changes	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Process Evaluation	The organization has a system to measure whether activities are implemented as planned	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Outcome Measurement	The organization has a system to measure the results of its programs and services	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	

Community Engagement	Community Engagement Practices	Rating	Notes for Rating
Community Awareness	The organization has undertaken activities (e.g. meeting with constituents, needs assessment survey) to gain an understanding of the needs in the community	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Community Awareness	The organization has developed written materials for the public	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Community Awareness	The organization has made presentations about its activities and services in the community	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Community Linkages	The organization, its purpose and its leaders are known and welcome in the community	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Community Partnerships	The organization has established collaborative relationships with key community members and institutions	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	

Revenue Development	Revenue Development Practices	Rating	Notes for Rating
Fundraising Plans	Fundraising plans are designed to increase the number and types of funding sources	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Individual Donors	Funds are solicited on a regular basis, not only during a crisis	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Grant Writing	Grant funding contributes to the funding base	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	
Board strength in fundraising	The board raises funds for the organization	<input type="checkbox"/> Needs a lot of work <input type="checkbox"/> Needs some work; <input type="checkbox"/> Needs a little work <input type="checkbox"/> We do this well <input type="checkbox"/> NA	