FIO Partners, LLC

ORGANIZATIONAL DEVELOPMENT IN NONPROFIT ORGANIZATIONS

KEY TASKS AND INDICATORS

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Introduction

Who we are

FIO Partners, LLC is a consulting firm that works with non-profit organizations, foundations and government in the US and Canada. In addition, we offer a number of tools and resources that organizations can use to measure their organizational development, either on their own or with our help. All of these tools are available on our website, located at *FIOPartners.com*.

Purpose of this tool

The purpose of this tool is to allow a group of organization members to examine aspects of the organization's functioning in some depth and to guide that discussion to the Key Tasks and Indicators most relevant to its current needs. The tool is most useful as a contribution to the assessment of internal strengths and weaknesses in support of strategic management. The Key Tasks and Indicators included here are illustrative of good management practice in health and human services. They do not cover every aspect of each function, but rather are designed to spur discussion around this function and to anchor that discussion around important developmental tasks. This discussion may prompt attention to additional areas of development that are unique to each organization's development and context.

The tool includes Key Tasks and Indicators for four stages of development: Idea, Start Up, Growth and Established for each functional area. Before using this tool, you should use the FIO Partners Stage of Development Guide to identify the set of Indicators you should start with. The Guide is free and can be downloaded from the FIO Partners website. For example, if the Guide indicates that you have completed the Idea and Start Up stages in a particular function, there is then no reason to review those Indicators. Instead, start with the Indicators in the Growth Stage. If there are one or more Key Tasks left out in the previous stage, you can simply add those missing Key Tasks to your review. Similarly, if you have substantial work to do in the Growth Stage, there is no reason to review the agency against the Established Stage Indicators though Agency Leaders may want to become familiar with them so they can anticipate the coming challenges.

Instructions

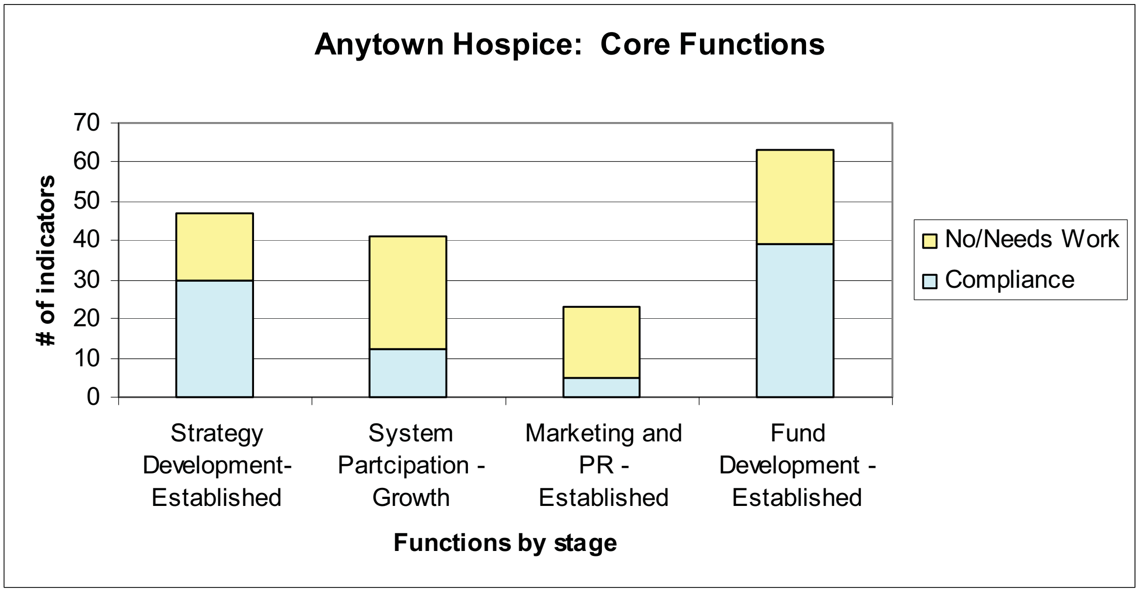
You have purchased these Indicators because you are interested in looking more deeply at how your organization is carrying out management functions. We suggest that you gather a group of staff and Board who have the most knowledge of how the organization is currently functioning in each of these areas. We have made a suggestion as to who should attend for each functional area. We also encourage you to involve outside experts from colleague agencies or who are already professional advisers. If you are tackling all of the functions included in the tool, do not try to schedule all of these discussions on the same day. It is best to spread them out over a couple of weeks.

The purpose of each discussion is to create a shared awareness among relevant staff and Board of where the organization is developmentally and to identify areas in which the organization can purposefully evolve. Each member of the group should have a copy of the Indictors ahead of the meeting and should rate the agency on each Indicator of each Key Task. The Key Tasks appear in the second column of each table and their matching indicators appear in the fourth column. One can read them in sequence as "When our organization….<Key Task>, does our organization…<Indicator>?"

When the group convenes, the discussion should initially seek agreement on the rating. An easy way to do this is to ask each person present to state their rating. Consensus can be quickly identified in this way. On those items where there is no consensus, time should be taken to ensure that the group has a similar base of information (you will find that one or more individuals often have special insight). Once the information base has been shared, try again to achieve agreement.

The group leader, often the CEO (though an outside facilitator can be used), keeps time and encourages the group not to bog down. This individual will record the decisions reached. The results should be summarized as a list of Key Tasks and Indicators that have not yet been accomplished as well as those that have been started but need work. These areas can be recorded on a flip chart. The group can then set priorities for what needs to be worked on in this area in the coming months. Priorities should be judged in the context of the organization's environment so remember that no Key Task and its Indicators will, nor should be, equally important.

The Indicators for each stage are numbered. If you count the number of items completed and then compare to the number of items in your current stage, you can determine how close you are to entering the next stage. If almost all of the Indicators are complete, you may want to look at the next stage as well in order to identify the upcoming challenges of further development in this area. These ratios can also be graphed as the example below indicates. Using the tool a second time after work has been done in this area is recommended. If the results of the first and second review are both graphed, you can create a visual record of the effectiveness of your intervention.



Copyright issues

By purchasing this tool, we are giving you permission to copy the instrument and to distribute it to your staff and Board. We want to encourage organizations to use measurement tools to better guide their organizational development. You should end up with an action plan at the completion of the first review. We encourage you to work in this area for six months, use the tool again, compare results and assess your progress. For your own re-measurement, you don't need to purchase an additional copy. We do ask that you not share the instrument with other organizations.

ASSESSING THE CORE:
PROGRAM STRATEGY

KEY TASKS AND INDICATORS

Suggested participants:
In larger organizations, participants may include program managers, Quality Assurance staff, and one or more Board members with a particular interest in program issues. Smaller organizations may want to involve all program staff or a representative group as well as Board members.

PROGRAM STRATEGY DEVELOPMENT
IDEA STAGE KEY TASKS AND INDICATORS

	KEY TASKS WHEN YOUR ORGANIZATION:		INDICATORS DOES YOUR ORGANIZATION…..?	YES	NOT YET	NEEDS WORK
SD1	Identifies new community need, gap in existing system, or market opportunity	1	Clearly identify the information on which judgment of need is made			
SD2	Researches the problem area to be addressed	2	Define program areas broadly and select an appropriate field or industry grouping			
		3	Use community resource directories, online supports, interviews to identify relevant key informants			
		4	Meet with representatives of other organizations providing services in this area and become informed about what is already being done			
SD3	Determines if there is evidence based or best practice in this area (a model that has been proven to be effective)	5	Use key informants and online resources to identify relevant research			
		6	Identify and contact funders in this area of interest to solicit information on evidence based studies			
		7	Compare this research with your concept for the program			
		8	Incorporate best practices to the degree possible in your program plan			
		9	Use key informants and/or online resources to identify relevant research			