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## **A Health Assessment for Your Organization, Fourth Edition<sup>©</sup>**

### **A Tool to Accompany *A Vision for Your Organization*, Part II: *How A Healthy Help Center Functions* (Third Edition, Heartbeat International ©2004)**

This assessment tool is intended for use by Directors and Boards of life-affirming pregnancy help centers, maternity homes, and nonprofit adoption agencies. Its purpose is to help you determine how well your organization is functioning overall and to identify areas for growth and development. It is an essential tool for planning and goal setting and should be used in conjunction with the how-to manual published by Heartbeat, *A Vision for Your Organization*.

#### **Suggestions for use:**

- Have all Board and essential staff members answer the questions individually. Then have someone average the scores for each individual section and give an overall average score.
- One or two areas with the lowest scores can become the topics for a special Board retreat or day-long planning session. Or, a series of Board meetings can be designated to deal with one or two areas which are of concern.
- Together, read the sections in Part II of *A Vision for Your Organization* on which you have scored the lowest. Discuss the material and perhaps consult additional written material or experts in these particular areas. (See below for Heartbeat materials and consultation.)
- At the Retreat or series of meetings so designated, the Board and Director together can plan goals and objectives in the areas needing the most work.
- Do not try to do everything at once! One or two major areas will probably be all that your organization can work on at one time.

#### **Heartbeat Consultation and Materials to Help**

You may want to have a consultant from your community help the Board with this project, or Heartbeat can assist you if you are a Heartbeat affiliate. The cost for Heartbeat consultation includes travel expenses and room and board for the consultant plus a per diem honorarium. Please call the Heartbeat office for information on our individualized consultation program.

Heartbeat is regularly publishing materials which will help you improve in various areas. For example, our *Sample Policies and Procedures* manual has an excellent introduction on how to write policies and procedures; it also contains sample policies on client care programs and volunteer management from two Heartbeat affiliates. We have manuals on effective client programs, including a Medical Manual. We also have manuals on Board development, hiring, performance reviews, and a computer program for help in fundraising, program statistics, and marketing. ***Please call the Heartbeat office or see our website for a list of most current publications.***

**Since this assessment tool is copyrighted, you may not make copies of this questionnaire. Assessment tools are available for your Board from the Heartbeat office for a donation of \$1.00 each.** <sup>□</sup>

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**Directions:** For each Key, read the four statements (A, B, C, D) and choose the one which best describes your organization. Put an “X” on the line beside that statement. Then put a Score in the box. If you chose A, give yourself a “1”; if you chose B, give yourself a “2”; if you chose C, give yourself a “3”; if you chose D, give yourself a “4”. If your organization is between an A and B, B and C, or C and D description, you may give yourself a score of 1.5, 2.5, or 3.5.



## Key 1: Servant Leadership Guided by Biblical Principles

- |  |  |
|--|--|
| <p>___ A. Most of our leaders seem to be involved in the organization to meet their own needs (for power, love, self-worth, restitution for a past wrong, etc.) or because they are fulfilling a “civic duty” to serve in a charitable organization</p> <p>___ B. Some of our leaders seem to be here primarily to serve others and be instruments of the Lord; however, many others in key positions seem to be here to meet their own needs.</p> | <p>___ C. Most of our leaders seem to be here to serve others, following the example of Christ, not to meet their own needs.</p> <p>___ D. All of our leaders are consciously here to serve others, following the example of Christ, and they discuss openly with each other the ministry nature of our organization, what Biblical values this implies, and what this means for leadership; servant leadership is a key quality sought when new leadership is invited into the organization. When disagreements or hurts arise, our leaders work for understanding, unity, and healing.</p> |
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**Score for Key 1**



## Key 2: A Responsible Board

### Area One: Composition and Meetings

- |   |  |
|---|--|
| <p>___ A. We have a Board, but it doesn't really function, and it's not clear who is on the Board at this time.</p> <p>___ B. We have a Board, which meets occasionally.</p> <p>___ C. We have a Board, elected annually according to our by-laws, which meets regularly; we try to elect Board</p> | <p>members who can contribute a particular skill or expertise to the Board and who can add wisdom and balance.</p> <p>___ D. We have an annually elected and regularly meeting Board, composed of business-minded and mission-minded members who each contribute a particular skill, expertise, or vision to the Board; the Board and Director regularly evaluate the composition of the Board, recognizing when a new or different expertise or viewpoint is needed to add wisdom or balance.</p> |
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**Area Two: Responsibilities and Jobs**

- \_\_\_ A. Our Board has never specifically discussed its responsibilities and jobs; it gives advice when asked and approves what is brought before it.
- \_\_\_ B. Our Board knows that it is responsible for the organization, but Board members aren't very active or involved in the organization.
- \_\_\_ C. Our Board consciously tries to determine its responsibilities and jobs within the organization and almost all members are active and involved in working for the organization.
- \_\_\_ D. Our Board has studied the responsibilities of non-profit Boards and makes sure all Board members understand these responsibilities; job descriptions are provided for all Board members, including those with specific jobs (such as officers and committee chairpersons), and the Board regularly evaluates its performance.

**Area Three: Relationship between Board and Paid Staff**

- \_\_\_ A. Since we have a paid Director (and staff), our Board has taken an advisory role and is not very "active" or involved. Or, since we have a paid Director (and staff), our Board now assigns someone else (i.e., the Director and staff) most of the work of running the center.
- \_\_\_ B. We have a paid Director (and staff) and our Board still wants to be involved, but it's not very clear who should be responsible for what and sometimes misunderstandings occur.
- \_\_\_ C. Our Board and Director negotiate their different responsibilities and jobs on an on-going basis, and they consider each other "peers."
- \_\_\_ D. The Board works continuously to clarify its role and jobs in relations to those of the Director (and staff), and this is accomplished through a relationship of mutual trust and respect, especially between the Director and the Chairman of the Board.

**Average score of Areas One, Two, and Three of Key 2**



**Key 3: Purpose or Mission**

- \_\_\_ A. It's not clear what the purpose or mission of our organization is.
- \_\_\_ B. Everyone here seems to know why the organization exists.
- \_\_\_ C. We know we need a mission statement and are in the process of writing down the purpose or mission of the organization.
- \_\_\_ D. We have a published, results-oriented mission statement, indicating what we do and for whom, which we evaluate periodically. We use it for planning purposes, especially as we decided what programs are appropriate for our organization and whether we are achieving our mission.

**Score for Key 3**



## Key 4: Policies (and Procedures)

- \_\_\_ A. Our organization hasn't given much thought to policies and procedures; each person does what seems right in each situation.
- \_\_\_ B. We generally agree on how things should be done, but we have only written down a few actual policies or procedures.
- \_\_\_ C. We have written policies and procedures manuals, which we revise occasionally, and make available to everyone; our manuals cover not only policies related to volunteers and programs, but also business office and personnel policies, which have been evaluated in light of legal issues, and have been approved by our Board.
- \_\_\_ D. Our written policies and procedures manuals are continually evaluated to be certain that policies are appropriate, legally sound, and Board approved, and that processes are still working well; we train new volunteers and employees at orientation on our policies and procedures and have a system for informing/retraining personnel when policies and procedures change.

Score for Key 4



## Key 5: Planning

- \_\_\_ A. Our Board and staff are so involved in the day-to-day operations and handling current crises that we have little time for planning; or, we have been doing things the same way for a long time, and we don't see the need for planning.
- \_\_\_ B. We talk and plan what we hope to accomplish, but we don't put much into writing.
- \_\_\_ C. We have an annual written plan, with general goals and measurable objectives, which has been developed by our Board and our Director.
- \_\_\_ D. We have an annual written plan with general goals and measurable objectives, plus a long-range plan (3-5 years) developed by our Board and Director; we evaluate our annual performance based on the goals and objectives set forth in the plan.

Score for Key 5



## Key 6: Budget and Accounting

- \_\_\_ A. We don't follow a written budget; but we only spend money when we have it.
- \_\_\_ B. We have a written budget each year, which is generally the amount spent in each category from the previous year.
- \_\_\_ C. Our budget is determined by our annual goals and objectives and our projected fundraising capabilities for the following year; we keep track of how well we are following our budget through regular financial reports and we make adjustments accordingly; a CPA consults with our organization.
- \_\_\_ D. Our budget is developed at the end of our yearly planning process and is based on our annual goals and objectives and our fundraising capabilities; an efficient accounting system generates regular financial reports (monthly, quarterly, annually) which help us stay within our budget (Director and Board Finance Committee see monthly, Board sees at regular meetings); our accounting system generates flow charts to determine monthly fluctuations in expenses and fundraising, and we have a "reserve fund" to keep us operating in months where there is a shortfall. A CPA firm consults with our organization and performs reviews or formal audits as authorized by the Board.

Score for Key 6



## Key 7: Organizational Structure

- \_\_\_ A. We have no written organizational chart/diagram and no written job descriptions, but everyone knows his/her job.
- \_\_\_ B. We have an organizational chart/diagram but no job descriptions for Board or for most staff members.
- \_\_\_ C. We have an organizational chart/diagram, showing Board position, Director's and staff positions, and volunteers; people are placed according to their strengths and ability to accomplish objectives, and each person (or group, such as Board or counseling volunteers) in the chart has a job description.
- \_\_\_ D. We have a complete organizational chart/diagram with people placed according to their strengths and ability to accomplish objectives, job descriptions for each position with written performance standards; this is reviewed and updated on a regular basis.

Score for Key 7



## Key 8: Internal Communication

- \_\_\_ A. Most of us in the organization work independently, with occasional phone communication or meetings.
- \_\_\_ B. We schedule meetings and, if people are too busy to attend, we place lots of notices in the office(s) and/or try to communicate by phone.
- \_\_\_ C. We have regular systems of communication among paid staff members (e.g., staff meetings), between paid staff and volunteers (volunteer meetings and/or newsletters, interviews), and between Director and Board (reports, committee meetings, informal communication, etc.).
- \_\_\_ D. Our regular systems of communication among paid staff members, between paid staff and volunteers, and between Director and Board have created a real sense of teamwork and cooperative spirit, and have led to a real effectiveness in achieving our mission, with few, if any, communication gaps.

Score for Key 8



## Key 9: Continual Evaluation

### Area One: Programs

- \_\_\_ A. We have a sense of how well things are going, but we don't take time for formal evaluation of our services.
- \_\_\_ B. We do evaluate some areas by collecting statistics and comparing from year to year, but we don't really set written goals or criteria by which we will measure success in our programs or services.
- \_\_\_ C. All programs are reviewed annually by comparing them to last year in terms of statistics and by collecting client feedback or exit forms; we look at our annual plan at the end of the year to see if we have achieved our goals.
- \_\_\_ D. Programs have written goals and measurable objectives by which they are evaluated annually. All evaluations are in writing. The annual plan is also evaluated at the end of the year to see if goals have been met, and revisions are made for the next year based on evaluations.

**Area Two: Personnel**

- \_\_\_ A. We have a sense of how well Board, paid personnel, and volunteers are doing, but we have no formal evaluations.
- \_\_\_ B. We do sit down with Board members, paid personnel, and volunteers occasionally to discuss how well things are going, but we have no written goals or criteria or written records to really measure performance.
- \_\_\_ C. We have yearly “performance reviews” for Board, paid personnel, and volunteers, and each person (and supervisor) fills out a form discussing strengths and areas for improvement.
- \_\_\_ D. All personnel have written goals to judge their achievement, based on the organizations’ mission, annual plan, their job description, and past performance review; an annual performance review is conducted for each staff member, the Director is evaluated annually by the Board, and the Board conducts its own annual review of itself as a Board (with intermediate informal evaluations and feedback throughout the year). On the basis of the annual reviews, individual goals and growth plans are established for the following year.

**Average score of Areas One and Two of Key 9**



**Key 10: People Development & Motivation**

**Area One: Job Placement**

- \_\_\_ A. We put anyone who volunteers into a job in an area where we need help.
- \_\_\_ B. We try to find out what people are best suited for before we give them a particular job.
- \_\_\_ C. We consciously try to determine a person’s gifts (through questionnaires, interviews, and testing) before hiring or accepting that person as a volunteer; then we try to place that person in the position best suited to his or her gifts and interests.
- \_\_\_ D. We have formal methods for determining interests and qualifications of any person who applies for a job or volunteer position, and we often recruit people for our specific needs; we try to understand each person’s interests, values and gifts to see if an how he/she would fit into our present team.



## Area Two: Motivation and Development

- \_\_\_ A. We presume that all are motivated by “cause” or by a call from the Lord.
- \_\_\_ B. We motivate our people by complimenting and thanking them when they do a job well or when we complete a project.
- \_\_\_ C. We try to understand what motivates each person in our organization and then to encourage each one to work in areas/projects/jobs which will keep up that motivation; we offer continuing training so people learn to do their jobs even better and
- \_\_\_ D. We try to understand what motivates each person and then place him/her in a job which will continue to motivate; paid staff and volunteers are encouraged and sometimes required to take advantage of continuing training “in house” and via outside seminars and conferences (this is covered in the annual budget), and what is learned is shared with others in the organization. Awards and recognition for service are also provided.



Average score of Areas One and Two of Key 10



## Key 11: Financial Development

### Area One: Diversified Fundraising Plan

- \_\_\_ A. We go about our work and the Lord provides us with funds when we truly need them.
- \_\_\_ B. We try to raise as much money as we can, primarily through fundraising events we have each year.
- \_\_\_ C. We plan a realistic amount that we need to raise each year to correspond to our annual goals and budget. We don't rely on just one type of fundraising, but set specific goals for our fundraising events, for contributions from individual donors and churches, and for grants from foundations and businesses (and perhaps government sources). Our computer keeps track of how successful each fundraising effort is (our fundraising
- expenses compared to income for each effort).
- \_\_\_ D. We have an annual written fundraising plan with specific goals for diversified sources (events, donors, grants), which is in accordance with our annual goals and budget. Our computer keeps track of expenses vs. income for each project, and adjustments are made on an ongoing basis if our expectations are not being met. We also actively encourage planned giving, with assistance available to individuals who can contribute to our organization through wills, trusts, and annuities.

### Area Two: Ministry/ Ministry Mentality

- \_\_\_ A. We hate to ask for money; we wish we didn't have to bother people by asking them to help us financially.
- \_\_\_ B. We limit the time we can devote to fundraising; we know it is essential to our existence, but it is not as important as our client services.
- \_\_\_ C. We believe that giving of financial resources is another way of giving of self; we want to offer people this opportunity.
- \_\_\_ D. Fundraising is a ministry too, since through our fundraising we offer many people another opportunity to be involved in God's work; donors are our full partners in the ministry.

**Area Three: “Friendraising”**

- \_\_\_ A. We try to acknowledge each donation, but some “fall through the cracks” because we are too busy.
- \_\_\_ B. We send a written “thank you” note for all donations, and we keep donors on our regular newsletter list.
- \_\_\_ C. We communicate regularly with all donors, through mailings and occasionally through a phone call. We have met all of our “big” donors to thank them in person and get to know them.
- \_\_\_ D. We devote a great deal of time to developing our partnership with our donors, individuals, families, businesses, foundations, and churches. Our computer system keeps track of donor history and segments donors via special codes and files, so we can send personalized letters and mailings to special groups of donors. Major donors receive personal notes, calls, and sometimes a visit from our Director or a Board member.

**Average score of Areas One, Two, and Three in Key 11**



**Key 12: Marketing**

- \_\_\_ A. We haven’t really thought about what or who our “market” is.
- \_\_\_ B. We generally know that we want to reach clients who need our services, and we reach them the way we always have, primarily through the phonebook and by word of mouth.
- \_\_\_ C. We realize that we need to attract not only clients, but also volunteers and donors. We ask clients how they hear about us and keep track of that data; we try to advertise where and how we will reach the kinds of clients we want to serve. Our donors and volunteers are most often church people, so we try to put notices in church bulletins and newsletters, gearing our messages to specific audiences.
- \_\_\_ D. We have completed research on our donors, volunteers, and clients, so we know what they think of us and what attracts them to us; we have also worked through a marketing plan, and we are clear about our “niche” in the community, so we can confidently plan our communications and marketing for each specific audience.

**Score for Key 12**



## Special Key: Legal

*(This is not designated as a specific key in A Vision for Your Organization, because legal issues permeate many of the other keys; however, it is presented here for clarity and to highlight specific legal issues, which are essential to the healthy functioning of life-affirming service organizations.)*

- \_\_\_ A. We were set up by a lawyer at one time, and we presume that our legal house is in order.
- \_\_\_ B. We have a lawyer on our Board (or Advisory Board), and we contact him/her when specific legal questions come up.
- \_\_\_ C. We have had a review recently of several legal issues, making sure that we are a 501(c)3 organization; we are filing the proper reports annually with the federal government (Form 990) and with the state; our by-laws are appropriate and requirements in by-laws (such as our annual meeting or election of Board members) are being met. We have investigated our insurance needs and are well covered, both for general liability, counselors' liability, Board and Director's liability, and
- \_\_\_ D. We have had a review recently of important legal issues (our incorporation, required filings, and by-laws); we are well covered by appropriate insurance for the services we provide (including, perhaps, medical liability). We have a reliable and competent local attorney. We seek out legal training seminars offered for pregnancy help centers, receive available newsletters and manuals to keep us updated on important legal concerns, and make it a priority to update policies and procedures when needed to protect our organization and operate effectively within the law.

**\* Extra Credit:** Add one extra point if you can answer "yes" to the following:

We are adding or have added medical services (e.g., ultrasound), and we have recently had a "Legal Review" completed by Heartbeat, Care Net or NIFLA. We have also completed the "Medical Services Review" in the Heartbeat/CareNet Medical Manual.

Yes                      No

**Score for Special Key**

**How to Determine Your Final Score:** Add all numbers in boxes and divide by 13 to arrive at your average score and place it on this line. \_\_\_\_\_

How to Interpret Your Score: Most healthy and effective nonprofit organizations will have a score of 3 to 4. The larger and more complex the organization, the higher the score will probably need to be for an effective organization. Some small or new organizations may function fairly effectively for a time scoring in the 1 to 2 range. However, as an organization grows and/or ages, it will probably need to institute some of the more “formal” structures and methods described by a score of 3 or 4 (i.e. C and D statements) if it wants to continue to be effective.

**Based on your assessment above, write out your answer to the following questions:**

1. What are the three keys that you think deserve most attention or are the major areas for growth in your organization?
2. If you had to narrow it down to one key which requires immediate attention in your organization, which key would it be?
3. What are some of the ways (keys) your organization is already functioning in a healthy way?
4. How do you think your organization should begin to address some of the areas for growth? (Who could do what?)
5. How do you feel about having a (perhaps) new “vision” (the 12 Keys) for helping your organization function in a more healthy way, i.e. what are your feelings having done the assessment?