Organizational Self-Assessment

Organizations are ecosystems, made up of many interconnected relationships, structures, policies, practices, norms, and values. This document is intended to help us identify the specific elements that lead to a flourishing and just organizational ecosystem.

There are two purposes for this document:
- (1) To help your organization self-evaluate and identify priorities; and
- (2) To harvest information we can use to create a peer support network and resource databank.

The document is divided into sections that correspond to the modules offered throughout the gathering. Each section contains a brief paragraph that describes the ideal state of an organization as it relates to that topic and then a table of practices that support the emergence of that ideal state.

How to work with this tool:
- The left-hand column describes the practice.
- The middle column invites you to rank yourself on a scale of one-to-ten with respect to that practice.
  - "1" means that you haven't really thought about it yet and a "10" means you are excelling at it.
- The right hand column asks you to name whether you can provide coaching or a resource around the practice.
  - "Coaching" means you could speak with someone. "Resource" means some type of media (i.e. written document, image, webinar)
- There are extra rows in each section for you to add any practices you know of or learn about that you think are really important.
  - If you add anything, we'd love if you told us so that we can include it in future materials!
- We'll be asking you to share with the group which areas your organization can offer coaching or resources, and where specifically you could use support.

We are also grateful for any feedback you can provide us on this worksheet. We hope that these can become useful visions for organizations, but we need input from more perspectives and voices before we can make them fully public.

Principles and Values

People within your organization have honest, vulnerable, and direct conversations about who they are, what they value, and why they are doing the work of the organization. Your organization has agreed to a set of shared values that individuals agree to enact in their interactions with each other and through the programs they offer to the world. Your organization dedicates time to unpacking and exploring the depth and complexity of your values; you are not satisfied with the use of buzzwords or jargon and you are willing to learn and take action that brings you into closer alignment with those values.

Practice	Self-Assessment (1-10)	Offering? (Coaching or Resource)
Process(es) of collective reflection to engage with values and deepen understanding		
Written record of shared values and principles which are shared with everyone when they enter the organization.		
Organization reflects on its alignment with values		
Individuals reflect on their alignment with values		
Policies and practices emerge in direct response to values		

Notes:

Organizational Culture

Your organization is a place where all people feel like they can belong. Though personalities, styles, habits, and struggles regularly create friction between people, open communication and compassion help the group adjust to everyone's needs according to the organization's values. Individuals have a strong understanding of how oppression manifests in their workplace and work to undo this by making changes to the organization and to their mindsets and behaviors. Many different cultural modes can be seen in your organization, and no single way of being or relating dominates the space.

Practice	Self-Assessment (1-10	Offering
Group engages in anti-oppression training regularly		
Designated times for group to honestly reflect on culture		
Organizational resources and staff time are spent empowering staff to tend to culture		
Spaces are created to invite people to act and relate in many different ways, not just as "professionals" (i.e. embodied activities, physical labor, different types of facilitation)		
There are many different ways for someone to express discomfort with culture (i.e. they don't have to wait until a big meeting and then say it publically)		
New staff is provided support with acculturation		
Successes are celebrated		

Organizational Structure

Individuals and teams have a strong sense of purpose. They understand how to contribute to collective goals and are empowered to make decisions that further their projects. Coordination, alignment, and prioritization are achieved through a collective decision making process that ensures no single person or small group of people exert directive leadership over the organization. The Board of directors has a clear purpose and scope of authority that is specifically tailored to the context and mission of the organization. External stakeholders and collaborators are engaged intentionally and their input and influence on strategy and programs is valued. People with an interest or concern are empowered to evolve the organization over time in response to changing needs. The structure allows staff to find a place within it that allows them to flourish and grow.

Practice	Self-Assessment (1-10)	Offering (Coaching or Resource)
Teams/Projects have purposes		
Clear standards for what kinds of decisions are made by what teams		
Decisions are made as much as possible by people most impacted		
Self-direction formalized in bylaws		
Role of Board of Directors and members is formalized in bylaws or policy documents		
Board training reflects organization's practices and values		
Staff have significant control over the roles they fill in the organization		
Regular process for transferring roles		
Activities of different teams/programs are strategically coordinated		
Information is accessible and transparent		
Engaged in networks and partnerships that are mission aligned and supportive of the organization's stated values		

Practice	Self-Assessment (1-10)	Offering (Coaching or Resource)
Volunteers and recruitment process are aligned with the organization's stated values and culture		

Notes:

Getting Stuff Done

Collaboration is supported by clear processes and expectations for how work gets done. These processes are recorded and also enacted by the organization. Different kinds of labor (i.e. intellectual, logistical, emotional) are distributed amongst different people in the organization. Each staff person has input into decisions about workflow and content that meet their personal roles and values. When a person notices a way to improve the organization's practices, they are empowered to prompt change.

Practice	Self-Assessment (1-10)	Offering (Coaching or Resource)
Proposal Formation Process includes clear method for voicing concerns and suggesting improvement.		
Decision Making Process is transparent and people understand it.		
Policies are recorded in a way that enables access		
Practices are in place to hold people accountable to policies		
Internal Communications System is structured in way that supports all voices.		
There is an ethos of upskilling		
Many people can facilitate meetings effectively, all are encouraged to develop their skills		
Strategic planning is shared by all individuals		
Programs are developed collaboratively		
Different types of labor are equitably distributed throughout the organization		
Documentation for institutional learning		

Developing and Integrating People

People with different skill sets and backgrounds are supported as they learn how to engage with the organization's culture and systems. There is a flexible relationship between organizational culture and new hires; new hires are expected to grow and shift into the organization and the organization is expected to grow and shift to make space for the person. There are many opportunities for people to develop new skills and step into different kinds of leadership. The organization is a site of personal and professional growth.

Practice	Self-Assessment (1-10)	Offering (Coaching or Resource)
Onboarding Process is clear and distributed.		
Conflict Engagement Process(es) is transparent and regularly engaged.		
Formal Peer Support		
Ethos of Upskilling		
Many leadership opportunities		
Performance Reviews are peer driven and supportive of improvement.		

Notes:

Working with Money

You organization is sensitive to the moral, logistical, and emotional complexities that surround money, and you talk about them openly. You take seriously the power and responsibility of directing the flow of financial resources. You create systems that distribute the money you have access to in a way that counteracts oppressive forces and builds upon liberatory visions.

Practice	Self-Assessment (1-10)	Offering (Coaching or Resource)
Staff Compensation Philosophy is built through an inclusive collective process and is recorded.		
Compensation practice reflects philosophy		
Participatory Budgeting Process		
Funding serves the strategy, does not direct it		
Process to distribute fundraising responsibilities		
Relationships to funders are held and maintained by multiple people, rather than being concentrated		

Notes: