

ORGANIZATIONAL CAPACITY ASSESSMENT WORKSHEET

	SATISFACTORY	UNSATISFACTORY	NOT APPLICABLE
ORGANIZATIONAL PURPOSE			
1. Concise, written mission statement			
2. Artistic philosophy/intent clearly articulated			
3. Understanding of mission/philosophy by board			
4. Understanding of mission/philosophy by staff			
5. Understanding of mission/philosophy by constituency			
6. Understanding of mission/philosophy by funders			
7. Mission and philosophy reviewed regularly			
PROGRAMS			
1. Vision provided by artistic leadership			
2. Continuity of artistic direction			
3. Annual program planning process			
4. Method for review/evaluation of programming			
5. Method for determining if programs meet constituent needs			
6. Internal and external communication about program plan			
7. Adequacy of rehearsal/preparation time			
8. System for costing out program elements			
9. System for analyzing cost-effectiveness of program			
GOVERNANCE			
1. Understanding of function/duties of board			
2. Written board job description			
3. Current, functional by-laws			
4. Procedures for appraising short term/long term objectives			
5. Recruitment, orientation, education of new board members			
6. Procedures for evaluating board members			
7. Structure of board committees			
8. Frequency of board meetings			
9. Attendance at board meetings			
10. Effective use of time at board meetings			
11. Board attendance at performances/exhibits			
12. Financial reporting to board			
13. Diverse community representation on board			
14. Board members donation of time/expertise/cash			
15. Board members sense of involvement/commitment			
STAFF			
1. Clarity of organizational structure			
2. Clarity of reporting relationships			
3. Current and accurate job descriptions			
4. Administrative leadership			
5. Communication between staff, board and artists			
6. Appropriateness of staff size re: work load			
7. Staff experience in relation to job assignment			
8. Time available to perform jobs satisfactorily			
9. Staff use of consultants/contractors			
10. Salary scale for staff			

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	SATISFACTORY	UNSATISFACTORY	NOT APPLICABLE
11. Staff morale			
12. Work environment			
MARKETING			
1. Understanding of who currently patronizes organization			
2. Understanding of who org. wants as patrons(target markets)			
3. Understanding of competition			
4. Tracking of actual ticket sales/attendance by event			
5. Annual marketing plan			
6. Marketing/promotional materials			
7. Earned income strategies short term/long term			
8. Ability of org. to consistently meet earned income goals			
9. Size and accuracy of in-house mailing list			
PUBLIC/COMMUNITY RELATIONS			
1. Consistency/clarity of org. image communicated to public			
2. Mechanism for handling of public queries, complaints, etc.			
3. Annual public relations plan			
4. Effectiveness in representing the org. to its constituencies			
5. Mechanisms for receiving and evaluating feedback			
6. Organization's publications			
FUNDRAISING			
1. Process for setting annual fundraising goals			
2. Ability of org. to consistently meet fundraising goals			
3. Development plan for annual operating support			
4. Grantwriting capacity			
5. Individual donor research capacity			
6. Involvement of Board in fundraising activities			
7. Non-board volunteer support of fundraising effort			
8. Solicitor training			
9. Contributed income mix (public, fdtn, corporate, individual)			
10. Development materials			
11. Systems for recording/acknowledging gifts			
12. Systematized information about donors/prospects			
13. Mechanisms for renewing past/lapsed donors			
FINANCIAL MANAGEMENT			
1. Annual budgeting process			
2. Board mechanism for reviewing financial information			
3. System for regular cash flow projections/monitoring			
4. Formalized cost controls			

