

Association/Organizational Assessment

Bob J. Holder
Executive Resources Center & Gray Matter Productions
620 Roosevelt Drive
Edwardsville, Il. 62025
(314) 772-8154/ (618) 692-0258
Fax (314) 772-8154/ (618) 692-0819
E-Mail: HBob372917@aol.com
Web sites:
www.freeyellow.com/members/graymatterproductions
www.geocities.com/Eureka/Park/7566
www.geocities.com/Athens/Delphi/7527/discontinuous.html
Our Ukraine Project:
www.geocities.com/Eureka/Park/7566/ukraine.html

Organization History

Why was the association started?

When was the organization started?

What caused it to thrive and develop?

How has the organization change since it founding?

How has the industry change?

What is the organization's niche?

How is the niche changing?

What do you perceive as the major trends in your industry?

What do you perceive as the major trends effecting your members?

Marketing/Member Focus

Who are your members?

What are your core assumptions and beliefs about members?

Why do members join your association?

How many active members do have on your books today?

How many member service people do you have?

How do you characterize a good member?

What is your investment in member retention?

Why does the organization lose members?

Who might be potential members?

Who will be your members in the future?

How does the organization serve members?

What services are provided?

How is member perception data used to improve services?

How does the organization involve members in it strategic and tactical decisions?

How often does the organization communicate and work with members?

Do the organization's policies and culture support timely service recovery from errors?

Is employee satisfaction with the ability to serve members assessed?

Competitive/Environmental Changes

Who are the organization's known competitors?

Who are potential invisible competitors?

How is technology affecting your association?

How do you monitor changes in your industry?

Strategic Development/Management/Leadership

What is the organization's vision?

What is the organization's uniqueness?

What are the organization's strategic advantages?

What are the organization's core abilities, skills and capabilities?

What is the organization's strategy(ies)?

What is the organization's mission?

What core values guide the organization?

What is your management philosophy?

Marketing/Relationships

What is your current distribution channel for providing services?

What might be future distribution channels?

How many vendors are the organization presently involved with?

Are there any alliances and/or partnerships with other organizations?

How do you market to secure new members?

Organization Improvement/Effectiveness

How are problems solved?

How are opportunities capitalized on?

Does the organization have a formal or informal process for continuous improvement?

Does the organization's culture encourage improvement through action and reflection/review?

Does the organization work with vendors to improve quality and/or create new products?

Does the organization actively support new product and service development?

Are employees actively involved in improving the organization?

What are the major challenges facing the organization in the next few years?

What is your vision of the future?

What are your plans for achieving your vision?

Does this vision stretch the organization?

What abilities, capabilities and skills will be required?

What changes in structure, systems, policies and managerial practices will be required?

Are members involved in new product and service development?

Organizational Organizing & Form

What is the form of the organization?

Who are the officers (partners)?

Who are the stakeholders?

How often do board members meet?

What role(s) does the board play?

Who is the executive director?

What is the organization's structure?

How effective is the present structure?

Does your structure encourage a "not my job" attitude?

Are you organized by critical processes, committees or departments?

Does your structure encourage collaborative efforts amongst departments and/or committees to solve problems and capitalize on opportunities?

Does it encourage creating new information?

Does it encourage information sharing?

Does it liberate or inhibit employees and/or volunteers in getting the job done?

Does the organization use cross-functional work teams to develop new product and service ideas?

Human Dynamics/Culture

Is office politics a problem?

What is the cost of office politics?

What is your employee and/or volunteer turnover rate?

What is the cost of replacing and developing new employees and/or volunteers?

Are employees and/or volunteers happy with their ability to serve members?

Are they happy with their ability to produce quality in their work?

Are people happy with the support they receive in performing their tasks?

What is your investment in employee training and development?

How do you develop employees and/or volunteers?

Does any of your employees belong to a union?

What is your relationship with the union?

Have you experienced a strike?

Who are your most critical employees and/or volunteers?

What are their duties?

Reward System

How are employees and/or volunteers compensated?

Does your system encourage self-motivation?

Does your system support individual, team or organization improvement?

Does your system support self-responsibility?

Does it encourage information sharing?

What are employees and/or volunteers rewarded for?

Marketing/Sales

What are your current annual sales?

What ought it be?

What is your current annual membership dues' revenue?

What ought it be?

What annual sales and dues' revenues are required for break even?

What are your most profitable products and services?

Will they remain profitable?

How many membership development persons do you have?

How are they compensated?

What are they compensated for?

Do they provide value added services to member?

Are they scouting members for opportunities and problems?

When they discover opportunities and problems, does your culture support them collaborating with other departments?

How many individual sales orders do you process each month?

How many individual new membership applications do you process each month?

When was the last time you reviewed the performance of your ordering system?

Measurement System

How do you measure value-added?

How do you measure productivity?

How do you measure innovation?

How do you measure quality?

Is member perception of service data collected?

Does the organization measure the difference between member expected and delivered quality?

Financial Management

What are your current revenues before expenses?

What ought they be?

How often do you receive an operating statement?

How do you use the statement?

How do you control operating costs?

How do you decrease operating costs?

What is your working capital?

What is the current value of your receivable?

What are your terms?

What is the average age of your receivable?

What are the current amount accounts payable?

How do you improve financial performance?

Is financial information shared with employees?

How are investment decisions made?

Have you experienced financial problems?

How do you project the organization's cash requirements?

How do you finance growth?

Inventory Management

Do you have a system of inventory control?

How often do you take a physical inventory?

Do you use just in time inventory?

How many different items do you have in inventory?

How much of your inventory is obsolete?

Information Technologies

How do you use information technology (computer)?

What information do you want but don't receive?

Why don't you get the information you want?

What other applications do you want to use information technology for?

When you purchased your information technology did you rethink your existing systems?

Assessment/Consulting Relationship

Why did you authorize this assessment and/or project?

What outcomes did you expect?

Have you every used the services of a consulting organization before?

What are your expectations about the consulting relationship?

Readiness For Change

What is your readiness to engage in change?

What are your expectations regarding implementing change?

How do you expect change to be implemented?

What do you see your role as in implementing change?

What do you see the consultant(s) role as?

How do your key people deal with change?

How do your employees and/or volunteers deal with change?

How successful have past change efforts?

What caused them to succeed and/or fail?

