LMA ORGANIZATIONAL SYSTEMS EVALUATION FORM

Description

The following comprehensive list of organizational systems and policies can be reviewed by LMA, LLC to assess what systems and policies might need to be developed soon.
Note that not all items are needed by all organizations.

The suggested approach:

1. Place a checkmark next to each item below that has been completed and is useful in your organization. You may add items next to "Other items:" below.
2. From among those items that are not checked, mark each top priority item with a "1", bottom priority items with a "3", and consider remaining items to be "2"s.
3. Record all items marked with "1"s onto a separate list of items to be examined by LMA, LLC soon.
4. Revisit this list each year to help identify top priority items to complete for that year.

CORPORATE ORGANIZATION / SYSTEMS EVALUATION

1. _____ Current mission / vision / values statements
2. _____ Board member recruitment system
3. _____ Board member orientation system
4. _____ Board development and training strategies
5. _____ Attendance policies
6. _____ Membership and term limitation policies
7. _____ Organizational chart
8. _____ Chair and officer job descriptions
9. _____ Committee charters
10. _____ Board operations and policy manual
11. _____ By-law review policies
12. _____ Chief executive performance review process
13. _____ Board self-evaluation process
14. _____ Board calendar with meetings, events, activities and updates
15. _____ Current strategic plan
16. _____ Diversity plan (for Board and staff)
17. _____ Marketing plan
18. _____ Fundraising / Development plan
19. _____ Board and committee work plans (with objectives and timelines)
20. _____ Yearly operations plan, including staff work plans
21. _____ (Other items:)

FINANCE SYSTEMS EVALUATION

22. _____ Board-adopted fiscal policies
23. _____ Board-approved fiscal year budget
24. _____ Financial procedures / internal controls manual
25. _____ Inventory system
26. _____ Depreciation schedules
27. _____ Cash flow analysis system
28. _____ Partial or full accrual accounting system
29. _____ Monthly financial statements with balance sheet
30. _____ Yearly audit or outside review
31. _____ Program analysis system
32. _____ Tax and other reporting schedules
33. _____ Payroll record system
34. _____ (Other items:)

INSURANCE SYSTEMS EVALUATION

35. _____ Risk management policies
36. _____ Office liability coverage
37. _____ Volunteers covered in office liability
38. _____ Workers compensation
39. _____ Disability insurance
40. _____ Assessment of need for professional liability coverage
41. _____ Assessment of need for director and officer liability
42. _____ Assessment of need for dishonesty bonding
43. _____ Contingency plans for replacing key personnel
44. _____ (Other items:)

LEGAL SYSTEMS EVALUATION

45. _____ Complete corporate records and retention policies
46. _____ Updated By-laws
47. _____ Incorporation and tax status documents
48. _____ Currently reviewed personnel policies
49. _____ Anti-discrimination practices
50. _____ Flexible benefit plan updates
51. _____ Membership rosters conforming to MN statutes
52. _____ (Other items:)

PROGRAM AND OUTCOMES EVALUATION

53. _____ Valid methods to assess client needs (focus groups, surveys, etc.)
54. _____ Established service outcomes to match client needs
55. _____ Established target indicators for each outcome
56. _____ Data collection methods for each target indicator
57. _____ (Other items:)

COMMUNICATIONS SYSTEMS EVALUATION

58. _____ Communications plan, including Web usage
59. _____ Annual reports
60. _____ Other regular communications strategies to stakeholders
61. _____ Agency brochures / videos
62. _____ Media relations strategies
63. _____ (Other items:)

INFORMATION MGMT & QA-CQI SYSTEMS EVALUATION

64. _____ Client program records
65. _____ Volunteer records
66. _____ Personnel records
67. _____ Financial records
68. _____ Donor and contributor contract records
69. _____ Mailing lists
70. _____ Work flow descriptions for each major operational activity
71. _____ Operations manual containing workflow descriptions
72. _____ Inventory of computer hardware, software, peripherals, etc.
73. _____ Procedures for each major function to maintain computer systems
74. _____ Regular backups of computer disks (one copy stored offsite)
75. _____ Disaster recovery plan (one copy stored offsite)
76. _____ (Other items:)

PERSONNEL SYSTEMS EVALUATION

77. _____ Board-adopted personnel policies
78. _____ All personnel policies in a handbook to each staff member
79. _____ Performance appraisal system
80. _____ Professional development plans
81. _____ Team development plans
82. _____ Recruitment and orientation systems
83. _____ Job descriptions
84. _____ (Other items:)

VOLUNTEER MANAGEMENT SYSTEMS EVALUATION

85. _____ Recruitment system
86. _____ Orientation system
87. _____ Management and retention system
88. _____ Recognition strategies
89. _____ Record system
90. _____ (Other items:)

FACILITIES MANAGEMENT SYSTEMS EVALUATION

91. _____ Fire and other emergency procedures
92. _____ Accessibility for differently abled
93. _____ Sufficient, safe and secure space
94. _____ Appropriate signage
95. _____ (Other items:)