

What do we need to know?

We need information in each of the following areas, both for individual departments and for the organization as a whole

- **Funding:** What's up with current and pending grants, governmental funding, private monies, contributions, other means of funding? What trends exist in these areas?
- **Fundraising:** What efforts are currently taking place and what plans are already in place for the future?
- **The Economy:** What's the economic outlook for an organization like this in this area in the next five years? How are things now? Trends?
- **Public Relations:** How is the organization viewed by the community? What is currently being done to bolster or improve this image? Is our image getting better or worse?
- **Stakeholders, Relationships, and Effectiveness:** Is the organization perceived as being effective, worthwhile, and a good community member and neighbor by:

Employees
Employees' Families
Clients / Customers
Clients' / Customers' Families
Neighbors
Vendors
Government Agencies
Regulators
Corrections / Probation
Contributors / Benefactors
Contractors
Insurance Providers
Financial Institutions
Other – What's missing from this list?

- **Quality of Service / Efficacy:** Are we doing what we say we do, as well as it can be done? What are our success rates? (What is success?) Which way is this trending? What metrics are used?
- **Legal and Regulatory:** What laws and regulations must the organization comply with? Are we in compliance? Trending toward? Trending away? Who provides oversight / advice / help? Current lawsuits?



- **Health and Safety:** What are the statistics with regard to absenteeism / Work Comp claims, etc.?
- **Politics:** How does the current political climate affect the organization as it exists today in the country, state, county, city? What political trends exist?
- **Compensation:** Are salaries and benefits competitive? Impact of current compensation levels on bottom line.
- **Internal Financial:** Where does the organization stand in terms of solvency? What are the details with regard to how money is coming in and going out each month?
- **Contracts and contractors:** How maintained and tracked, and by whom? Trends?
- **Asset protection, expenses, and spending:** How tracked and by whom? Are the organization's resources being cared for / maximized?
- **Employee demographics:** Who are the organization's employees? (Race, gender, age, level of education, how referred, other...) Where do they come from? How are they recruited? Why this organization?
- **Client demographics:** Same questions as above
- **Departmental Collaboration:** How well do the different work groups within the organization communicate and collaborate as they work to accomplish their shared and individual goals?
- **Staffing:** Are there enough personnel to do the work effectively? Are there major vacancies or redundancies in the org chart?
- **Hardware, software, physical plant and utilities:** Are the facilities and tools adequate for effectiveness?
- **Staff development and training:** Is the organization providing its people with continuing education to keep them knowledgeable, engaged, current with licensing requirements, and effective in their work?
- **Omissions and redundancies in services:** Are there services that should obviously be consolidated or eliminated? Are there services the organization should be providing but isn't?
- **Other / More...** What's missing from this list?

