



EM Solutions Strategic Self Assessment Tool

Below are 10 statements relating to strategy within a non-profit organisation. Choose a response that is most applicable to your organisation. If the statement is completely true for your organisation, you would choose 'Got this', if the statement is partly true choose between 'Maybe', 'Sort of' and 'Yup' depending on how true the statement is for you. If you are unfamiliar with what is referenced in the statement or you do not have anything in place, then choose 'No clue'.

Once you have chosen the most appropriate response, put the number under the response in the Score box for that statement. After responding to all 10 statements, total up the numbers in the score boxes to establish the organisation's total score. Then look up what your total score means for your organisation in the results section at the bottom of the assessment.

Score

- 1 We have an up-to-date, well communicated and thoroughly integrated guiding document that articulates who we are as an organisation, who we work with and our core values.

No clue 1	Maybe 2	Sort of 3	Yup 4	Got this 5	<input type="text"/>
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- 2 We have a fully understood strategic plan for the next 3-5 years which outlines the key focus areas and objectives for the period, including breakdown of the programmes and activities that will be undertaken to achieve the objectives.

No clue 1	Maybe 2	Sort of 3	Yup 4	Got this 5	<input type="text"/>
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- 3 We have a clearly documented theory of change that is thoroughly understood throughout the organisation and integrated into all programme activities.

No clue 1	Maybe 2	Sort of 3	Yup 4	Got this 5	<input type="text"/>
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- 4 We have organisation-wide practices that ensure programme activities are regularly reviewed, lessons are extracted, and programmes are adapted to incorporate learning and improve impact.

No clue 1	Maybe 2	Sort of 3	Yup 4	Got this 5	<input type="text"/>
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- 5 Our board and management team frequently set aside time for thinking strategically about the sustainability of the organisation.

No clue 1	Maybe 2	Sort of 3	Yup 4	Got this 5	<input type="text"/>
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6 We have a clearly documented, pro-active fundraising strategy that involves the whole team.

No clue
1

Maybe
2

Sort of
3

Yup
4

Got this
5

7 Our organisational structure and future recruitment plans aligns with our organisational strategy.

No clue
1

Maybe
2

Sort of
3

Yup
4

Got this
5

8 Our business model and financial model is the most appropriate model for our type of organisation.

No clue
1

Maybe
2

Sort of
3

Yup
4

Got this
5

9 We have a clearly documented plan to achieve sustainability and build reserves that remains a focus for the organisation.

No clue
1

Maybe
2

Sort of
3

Yup
4

Got this
5

10 Appropriate income generation activities are an integral part of our sustainability strategy.

No clue
1

Maybe
2

Sort of
3

Yup
4

Got this
5

TOTAL SCORE

What the TOTAL SCORE means for your organisation?

If you scored 10-20 OH DEAR!

You are passionate about your cause, but you are not entirely clear on who you are and why what you do works. You are going from day to day fighting fires without considering the long-term. Chances are good that you are just about breaking even each year without doing any of the organisation building things you dream about. You need to make the time to do the deep thinking and writing to gain crystal clarity on who you want your organisation to be so that you can inspire others.



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If you scored 21-40 **ROCKY ROAD**

You have a clear idea of who you are and what you do, although your board and your team may not be completely on the same page as you. Your organisation has a plan of action that you refer to occasionally to make sure you are on the right track. The organisation has done some thinking around strategic issues but it is not nicely documented, accessible and frequently referenced. Your organisation is probably financially sound for this year with some funding for next year. You still feel like you are fighting fires however, you have put some structures in place to reflect, review and plan. Your organisation's challenge is to rise above the detail and the short-term and agree long-term over-arching strategies that guide the organisation's actions into a sustainable future.

If you scored 41 - 50 **SUPER STAR**

Your organisation is a super star who has it all together. You have well thought out strategies for the growth and sustainability of your organisation. Your board and your team are on the same page and pulling towards a shared vision. Thinking, values and strategies are well documented so there is no ambiguity and you are able to share them with stakeholders outside the organisation in order to inspire passion and partnerships. You have a clear vision and a clear plan to achieve it. Your organisation is going places and earning the respect of others. Sure, there might be a few things you could tweak, but you are sorted.

If you would like support in improving your organisation's strategic thinking and documentation, please contact EM Solutions on www.em-solutions.co.za/contact-us to set up a meeting to discuss your challenges and the support that EM Solutions can provide.