

Your Organization's Report Card

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At the end of each year, organizations typically look back to assess how well they did over the previous year. This white paper presents an easy year-in-review exercise that can be tailored to most organizations. It will help you assess your yearly performance and organizational goals, and create a meaningful foundation for next year's plan.

How did your organization do this year?

December and January are when many organizations look back at their last year to assess their progress and think about how to improve next year. This is not as easy as it sounds. Putting aside major organizational events, such as a catastrophic scandal or an enormous windfall bequest, people can disagree strongly over whether the year was successful or not. A Program Director may be delighted with her achievements while the Board of Directors is grumbling over what they perceive to have been a lack-luster year financially.

Often, the inability to evaluate an organization's success is a direct result of having failed to set clear goals at the beginning of the year. Even when goals are stated, people tend to describe goals in vague, general terms. They do not establish clear criteria for judging success. Everyone may seem to be in agreement when they assent to organizational goal statements; yet they nonetheless leave the room with widely different expectations of what success needs to look like.

Here is a simple exercise you can do within your organization in as little as 1-2 hours. You may find it very instructive, and for organizations that do planning on a calendar-year basis this is a good time of year to do it.

1. Engage a group of your senior leaders to take part in this exercise. Working alone, each of you writes out what you would consider your organization's five or so most significant achievements for the last year.
2. Get together for a meeting. Hand each other copies of your list of achievements. As a group, collapse these into a single list. (Assuming your lists have items that overlap, use the best language from the different lists to rewrite overlapping achievements into a single statement on the master list.)
3. Have a discussion and create a list of what you agree (with 20-20 hindsight) were your most important organizational goals (not achievements) for last year (usually 3 to 8).
4. Place all of these items into one of the following categories:
 - A) Goals with matching achievements.
 - B) Goals for which you had no significant achievements.

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C) Significant achievements which did not truly match any of the goals.

5. Challenge yourself with these questions

- How closely did our lists of achievements match? Do we agree about what constitutes a significant achievement for our organization?
- Was it easy for us to identify and agree upon our top goals for last year? If not, why not?
- Looking at the list of achievements, how would we judge it in terms of both quantity and quality?
 - Did we really do exceptionally well last year?
 - Did we do well, but could we have (should we have) done better?
 - Considering what we aspired to, was our achievement list disappointing?
- Considering the goals and achievements in category A, what are the critical factors that made us successful?
- Considering the goals in category B, what obstacles kept us from having significant achievements here? Was the problem inherent in our goals or with our effort to achieve the goals?
- Considering achievements in category C, were these achievements truly strategic for our organization (consider “strategic” to mean: those achievements that helped us achieve our mission)? If so, should this tell us something about our goals for next year? If not, were these achievements worth the time and effort we invested in them?

6. Now, as a group, discuss your goals for the coming year and see if you can not only state what they are but also provide criteria by which to define whether or not you achieved them.

Organizations that do not plan well have no firm idea of what they are trying to accomplish, or how they can determine whether they have had a successful year. Other organizations plan with great relish, but discover a year later that their execution against the plans has been a dismal failure. In any event, if you take the time at year's end to look back systematically and honestly at what your organization accomplished over the last twelve months, you will be able to learn from the experience and, we hope, use the lessons to improve your plans and your performance next year.

*For further information about Strategic Planning or CDR's Management Consulting services for nonprofit organizations, feel free to contact Dr. Zimmerman at Creative Direct Response, Inc. or read his book on Strategic Planning: **“Management Walkabout: Discovering Your Organization's Strategic Readiness.”***

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