

## RURITAN NATIONAL

### ORGANIZATIONAL SELF-ASSESSMENT CHECKLIST

#### INSTRUCTIONS

Input in the attached checklist should reflect YOUR PERCEPTION of these issues at the NATIONAL LEVEL ONLY. Similar input may be obtained at a later time to reflect how these issues relate at the district and club levels.

Your assessment of each category should reflect how you actually feel about the issue from your own personal knowledge and/or awareness of the issue.

Assessment ratings:

- STRONG - More likely than not meets and exceeds the needs of the organization.
- ADEQUATE - Meet the needs of the organization but could be improved.
- WEAK - Does not meet the needs of the organization.  
(PLEASE GIVE YOUR REASON(S) AS TO WHY THIS IS WEAK AND ANY SUGGESTIONS/RECOMMENDATIONS FOR IMPROVEMENT)
- DO NOT KNOW - No knowledge of the issue.

Your General Comments may be very helpful toward improving our organization and the administration of its programs and projects and are appreciated.

Mail your completed Checklist to:

FUTURE OF RURITAN COMMITTEE  
c/o Millard Thacker  
140 Rassie Crabtree Road  
Rougemont, NC 27572

Thank you for your participation.

# RURITAN NATIONAL ORGANIZATIONAL SELF-ASSESSMENT CHECKLIST

Name of District/Area \_\_\_\_\_

Female \_\_\_\_\_ Male \_\_\_\_\_ Age \_\_\_\_\_ Total Years a Ruritan Member \_\_\_\_\_

**Check line that appropriately matches your status with Ruritan:**

- \_\_\_\_\_ District Leaders (Subsequently referred to as Officers)
- \_\_\_\_\_ Club Leaders (Subsequently referred to as Officers)
- \_\_\_\_\_ Home Office Staff (Subsequently referred to only as Staff)
- \_\_\_\_\_ Board of Directors (Subsequently referred to only as Board)
- \_\_\_\_\_ General Club Membership (Subsequently referred to only as Members)
- \_\_\_\_\_ General Public (Subsequently referred to only as public)
- \_\_\_\_\_ Past National Officers & Directors

Organizational Self – Assessment Checklist	S T R O N G	A D E Q U A T E	W E A K	D O N O T K N O W
<b>Organizational Purpose</b>				
1. Concise written Mission Statement				
2. Understanding of Ruritan Mission Statement				
<b>Programs/Service Plans</b>				
1. Written Programs/Service Plans				
2. Input from all levels of the organization for Programs/Service plans				
3. Timely communication of Programs/Service plans to all levels of the organization, including any needed changes/additions				
4. Programs/Service plans meet the needs of the organization				
<b>Leadership/Governance</b>				
Understanding of the responsibilities and purpose of the:				
1. Staff				
2. Board				
3. District/Area Leaders				
4. Club Leaders				
5. Understanding of constitution & by-laws				

<b>Organizational Self-Assessment Checklist</b>				
	<b>S T R O N G</b>	<b>A D E Q U A T E</b>	<b>W E A K</b>	<b>D O N O T  K N O W</b>
<b>Leadership/Governance continued</b>				
6. Understanding of organizational finances and the budgeting process				
<b>Staff/Board</b>				
1. Staff Effectiveness				
2. Board Effectiveness				
3. Staff Size (Mark Weak if you feel too small) (Mark Strong if you feel too large)				
4. Board Size (Mark Weak if you feel too small) (Mark Strong if you feel too large)				
5. Communication between Staff and Board				
6. Communication from Staff/Board to all levels of the organization				
<b>Marketing</b>				
1. Marketing Plan				
2. Growth Plan				
3. Understanding of the makeup of our current membership (i.e., Age, Education, Race, Gender, Profession, Income, etc.)				
4. Organizational Diversity				
5. Understanding of other service organizations and awareness of their activities, organizational diversity				
<b>Public/Community Relations</b>				
1. Effectiveness of Staff in representing the organization to the membership				
2. Effectiveness of Staff in representing the organization to the public				
3. Effectiveness of Board in representing the organization to the membership				
4. Effectiveness of Board in representing the organization to the public.				
5. Effectiveness of Club Leaders in representing the organization to the public				
6. Effectiveness of District Leaders in representing the organization to the public				

<b>Organizational Self-Assessment Checklist</b>				
	<b>S T R O N G</b>	<b>A D E Q U A T E</b>	<b>W E A K</b>	<b>D O N O T K N O W</b>
<b>Public/Community Relations continued</b>				
Mechanism for receiving and addressing queries, complaints, etc. from:				
7. Membership				
8. Public				
<b>Foundation</b>				
1. Fundraising goals established (i.e., donations, gifts, grants, etc.)				
2. Process/Procedures for setting/establishing fundraising goals				
3. Ability of organization to consistently meet fundraising goals				
<b>Financial Management</b>				
1. Annual realistic budget				
2. Ability of Staff/Board to manage budget/cash flow				
3. Efforts to reduce/control costs (cost containment)				
4. Operating reserves				
<b>Planning</b>				
1. Long range Plan (3-5 years) in-place and in-use				
2. Plan input from all levels of the organization				
3. Evaluation of previous years activities considered/used when establishing current year programs/service plans, fundraising efforts				
4. Evaluation input from all levels of the organization				
<b>Communication/Decision Making</b>				
1. Communication from Staff to membership is open, candid and timely				
2. Communication from Board to membership is open, candid and timely				

Organizational Self-Assessment Checklist				
	S T R O N G	A D E Q U A T E	W E A K	D O N O T  K N O W
<b>Communication/Decision Making continued</b>				
3. Decision making process is well informed, timely				
<b>External Environment</b>				
1. Understanding of Community needs				
2. Needs of the Community being met				
<b>Facilities/Equipment</b>				
1. Office Space				
2. Conference/Meeting/Training Space				
3. Storage Space				
4. Restroom Facilities				
5. Parking				
6. Computer Software				
7. General Office Equipment/Furniture				

General comments if any and explanatory comments for any item marked "Weak":

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