

Organizational Profile Questions

Your Organization's Key Characteristics

1. What are your organization's MISSION, VISION, and CORE VALUES? What are your organization's CORE COMPETENCIES and what is their relationship to your MISSION?
2. Who are your KEY CLIENTS and STAKEHOLDERS? What are their KEY requirements and expectations of your organization?
3. What are your KEY PRODUCTS, PROGRAMS, and SERVICES? How do they support your MISSION?
4. Who are your KEY suppliers and PARTNERS? How do they contribute to your ability to accomplish your MISSION and VISION? What are their KEY requirements and expectations of your organization?
5. What KEY elements ENGAGE your WORKFORCE in accomplishing your MISSION and VISION?
6. What major facilities, equipment, and technologies are essential to your operations?
7. Under what regulatory requirements does your organization operate?
8. What are your organization's LEADERSHIP SYSTEM and GOVERNANCE structure? What are the reporting relationships among your GOVERNANCE board and senior leaders?

Your Organization's Strategic Situation

9. What factors are critical to your organization's sustained success?
10. What other organizations (for-profit or nonprofit) provide similar services in your geographic area? What opportunities do they present for collaboration and/or INNOVATION?
11. What key changes could impact your organization (positively or negatively)?
12. What STRATEGIC CHALLENGES and STRATEGIC ADVANTAGES do you possess regarding your organization, your operations, and/or your WORKFORCE?
13. What is your SYSTEMATIC approach to evaluate and improve your organization?

Note: It is strongly recommended that you browse through the Glossary of Terms (Pages 2-4) because it defines and sometimes further explains the terms that are all-capitalized in the Organizational Profile.

Organizational Profile Glossary of Selected Terms

CLIENT/CUSTOMER – the term “client” or “customer” refers to actual or potential users or beneficiaries of an organization. In the nonprofit world, clients or customers might include individuals, organizations, recipients, donors, funders, and other beneficiaries. For nonprofits that sell or make products or goods as part of their operation (e.g., Habitat for Humanity, The Caring Place, BIG, and Goodwill), the business term “customer” is appropriate in those contexts.

CORE COMPETENCIES – core competencies are those vitally important capabilities that are central to fulfilling an organization’s mission or represent strategic advantages for the organization.

CORE VALUES – the guiding principles and behaviors that embody how an organization and its people are expected to operate. Values influence and reinforce the organization’s desired culture.

ENGAGE – for your organization’s clients and external stakeholders, this term refers to the degree of their investment in and commitment to your organization’s brand and offerings. For your organization’s workforce, this term refers to the extent of its commitment, both emotional and intellectual, to accomplishing the work, mission, and vision of the organization.

ETHICAL BEHAVIOR – the term “ethical behavior” refers to how an organization ensures that all its decisions, actions, and stakeholder interactions conform to the organization’s moral and professional principles of conduct. These principles should support all applicable laws and regulations and are the foundation for the organization’s culture and values. They distinguish “right” from “wrong.”

GOVERNANCE – refers to the system of management and controls exercised in the operation of an organization. It includes the responsibilities of the organization’s board of directors and senior leaders. Organizational charters, bylaws, and policies document the rights and responsibilities of each of the parties and describe how the organization will be directed and controlled.

INNOVATION – Making meaningful change to improve products, processes, or organizational effectiveness and create new value for stakeholders. Innovation involves adopting an idea, process, technology, product, or business model that is either new or new to its proposed application.

LEADERSHIP SYSTEM – the way leadership is exercised, formally and informally, throughout an organization; the basis for making key decisions and the way they are made, communicated, and carried out. A leadership system includes organizational structures and processes for making decisions; ensuring two-way communication; selecting and developing leaders and managers; and reinforcing values, ethical behavior, directions, and performance expectations. In nonprofit organizations, the term ‘senior leaders’ usually includes the senior staff and the Chair or Executive Committee of the Board of Directors.

KEY – refers to the major or essential elements or factors; those that are critical to achieving an organization’s intended outcome. It refers to key challenges, key plans, key work processes, and key measures--those that are most important to the organization’s success. They are the essential elements for pursuing and/or monitoring a desired outcome.

MISSION – refers to the overall function of an organization. The mission answers the questions, “What is this organization attempting to accomplish?” and “Why does the organization exist?”



PARTNERS – Key organizations or individuals who are working in concert with your organization to achieve a common goal or improve performance. Typically, partnerships are formal arrangements for a specific aim or purpose, such as to achieve a strategic objective or deliver a specific product.

PRODUCTS, PROGRAMS, SERVICES - refer to what the organization provides to its clients. Most nonprofits provide programs and services; some offer products (see Client/Customer above).

STAKEHOLDERS – the stakeholders of an organization are all the groups that are or might be affected by an organization's ongoing activities. Examples of stakeholders for nonprofits can include clients, the board, staff, volunteers, collaborators, individual donors, foundations, suppliers, taxpayers, local communities, government agencies, and regulatory bodies. Because of their special importance in planning and managing an organization, clients and workforce (staff and volunteers) are given specific focus in the assessment criteria. The Board is usually considered an integral part of the organization's leadership.

STRATEGIC ADVANTAGES – strategic advantages are those aspects that provide an organization with a decisive, or significant, likelihood of future success. These advantages frequently are sources of an organization's current and future success relative to other providers of similar programs and services. Strategic advantages generally arise from either or both of two sources: (1) core competencies, which represent an organization's internal capabilities, and (2) important external resources, which are shaped and leveraged through key external relationships and partnerships.

STRATEGIC CHALLENGES – are those external as well as internal pressures that exert a decisive influence on an organization's likelihood of future success. External strategic challenges may relate to clients or community needs or expectations; service or technological changes; or financial, societal, and other risks or needs. Internal strategic challenges may relate to an organization's capabilities or its human and other resources.

SYSTEMATIC – Well-ordered, repeatable, and exhibiting the use of data and information so that learning is possible. Approaches are systematic if they build in the opportunity for evaluation, improvement, and sharing.

VISION – an organization's desired future state. The vision describes where the organization is headed, what it intends to be, or how it wishes to be perceived in the future.

WORKFORCE – refers to all the people actively involved in accomplishing the work of the organization, including paid employees (e.g., permanent, part-time, temporary, and telecommuting employees, as well as contract employees supervised by the organization) and volunteers, as appropriate. The workforce includes team leaders, supervisors, managers at all levels, and, in some instances, members of the nonprofit organization's board. For many nonprofits, volunteers make up the bulk of the workforce.