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?

2. Who are your organization's KEY CLIENTS and STAKEHOLDERS? What are their KEY requirements and expectations of your organization?

3. What are your organization's KEY PROGRAMS/SERVICES?

4. Who are your organization's KEY suppliers, PARTNERS, and COLLABORATORS? 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 geographic areas does your organization serve?

7. What major facilities, equipment, and technologies are essential to your organization's operations?

8. What is your organization's LEADERSHIP SYSTEM? What is your organization's GOVERNANCE structure? What are the reporting relationships among your organization's GOVERNANCE Board and WORKFORCE leaders?

Your Organization's Strategic Situation

9. What KEY 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 or INNOVATION?

11. What KEY changes could impact your organization--positively or negatively?

12. What STRATEGIC CHALLENGES AND STRATEGIC ADVANTAGES exist regarding your organization, your operations, and/or your WORKFORCE?

13. What is your organization's SYSTEMATIC approach to evaluate and improve its programs, services, or operations?

Note: Refer to the Glossary of Terms (Pages 2 & 3) 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 – An actual or potential user of your organization's programs, or services. In the nonprofit world, clients or customers might include individuals, organizations, recipients, 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.

COLLABORATORS – Organizations or individuals who cooperate with your organization to support a particular activity or event or who cooperate intermittently when their short-term goals are aligned with or are the same as yours. Typically, collaborations do not involve formal agreements or arrangements.

CORE COMPETENCIES – Your organization's areas of greatest expertise; those strategically important, possibly specialized capabilities that are central to fulfilling your mission or that provide an advantage in your marketplace or service environment.

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.

GOVERNANCE – The system of management and controls exercised in the stewardship of your 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 programs, services, processes, or organizational effectiveness and create new value for stakeholders. Innovation involves adopting an idea, process, technology, program, service, 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. The Board is usually considered an integral part of the organization's leadership.

KEY – Major or most important; critical to achieving your 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 – Your organization's overall function. 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.

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

STAKEHOLDERS – All groups that are or might be affected by your organization's actions and success. 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 organizational assessment and strategic planning.

STRATEGIC ADVANTAGES – Those marketplace benefits that exert a decisive influence on your organization's 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 – Those pressures that exert a decisive influence on your 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 – Your 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 -- 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.