

2019



*Performance Unplugged:
Leadership Self Check*

The Bogan Group

Nonprofit Organization Capacity Building Series

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P.U.L.S.E. LEADERSHIP SELF CHECK

The PULSE LEADERSHIP SELF-CHECK TOOL is intended to help key nonprofit organization leaders determine your future direction by examining some of those functional areas that might be strengthened through internal review, programming, and planning. This is an informal process designed to enlighten, inspire and lead you in taking your organizations to the next level.

**“A genuine leader is not a
searcher for consensus, but
a molder of consensus.”**

Martin Luther King, Jr.

Civil Rights Leader

A. ORGANIZATIONAL PURPOSE	Y	N
1. Is the mission statement written and concise?		
2. Is the vision statement written and concise?		
3. Are the mission statement and philosophy reviewed regularly?		
4. Is there a concise, written history of the organization?		
5. Does the board understand the organization's mission and philosophy?		
6. Does the staff understand the organization's mission and philosophy?		
7. Do the public and constituents understand the mission and philosophy?		
8. Do prospective funders understand the mission and philosophy?		
9. Can the staff and board articulate the mission statement?		
10. Is the mission statement visible and clear in public documents?		

***P.U.L.S.E.* LEADERSHIP SELF CHECK**

B. PROGRAM PLANNING AND EVALUATION		Y	N
1.	Is there a clear organization annual plan for the current year?		
2.	Is the plan in writing?		
3.	Does the plan indicate measurable objectives and timelines for completion?		
4.	Does the plan clearly indicate who is responsible for achieving which objectives?		
5.	Is the process for developing the plan clear to the staff?		
6.	Is the process for developing the plan clear to the board?		
7.	Is the process in writing?		
8.	Does the plan include a process for evaluating the organization's success in accomplishing its goals?		
9.	Does the plan acknowledge other organizations/activities and the organization's links to them?		
10.	Does the board periodically review the plan?		
11.	Has the board formally endorsed the plan?		
12.	Are there clear annual plans for each program with measurable objectives and timelines for completion?		
13.	Are they in writing?		
14.	Is there evidence that evaluations are done for each program at least every two years?		
15.	Are those evaluations presented to the board?		
16.	Do the program plans and/or evaluations indicate the results of the programs as well as the activities planned?		
17.	Is there a 3 to 5 year plan?		
18.	Is the 3 to 5 year plan in writing?		
19.	Is the board familiar with the plan?		
20.	Has the board formally endorsed the plan?		

P.U.L.S.E. LEADERSHIP SELF CHECK

**LEADERSHIP IS A WAY
OF THINKING, A WAY
OF ACTING AND, MOST
IMPORTANTLY A WAY
OF COMMUNICATING**

C. INTERNAL COMMUNICATIONS/STAFF DEVELOPMENT	Y	N
1. Is each staff person clear about their reporting relationships?		
2. Does each staff person have a clear, written job description?		
3. Is there strong administrative leadership that facilitates smooth operations?		
4. Is there clear, open communications among staff members?		
5. Is there clear, open communications between staff and board?		
6. Is there clear, open communications among staff, board and community?		
7. Does the staff understand the role/function of the board?		
8. Does staff participate in planning?		
9. Is the staff size appropriate to implement the programming challenge?		
10. Does staff have the necessary education/training to carry out their assignments?		
11. Is there a system for regular performance reviews?		
12. Is there a benefits package for staff members?		
13. Is there strong, internal communications?		
14. Is there a salary scale for staff?		
15. Is staff morale high?		
16. Is the organizational technology current?		
17. Is the organizational structure clearly defined to staff members?		
18. Is there an effective system for resolving personnel issues?		
19. Does each staff person receive regular feedback about both strengths and areas for growth from his/her supervisor?		
20. Do the files contain documentation of regular employee evaluations, including indications of the need for improvement, signed by the employee?		

P.U.L.S.E. LEADERSHIP SELF CHECK

**"LEADERSHIP
AND LEARNING
ARE INDISPENSABLE
TO EACH OTHER."
-JOHN F. KENNEDY**

D. MARKETING/PUBLIC RELATIONS	Y	N
1. Is there a mechanism for handling public queries, complaints, etc.?		
2. Is there an annual public relations plan?		
3. Is the staff savvy in answering press inquiries?		
4. Is the organization effective in representing the organization to the press?		
5. Is the organization effective in representing the organization to the community?		
6. Do the organization's publications accurately represent its intended image?		
7. Does the organization know how to tell its story through the press?		
8. Is there clear, open communications among staff members?		
9. Is there clear, open communications between staff and board?		
10. Is there clear, open communications among staff, board and community?		

***P.U.L.S.E.* LEADERSHIP SELF CHECK**

E. FUND DEVELOPMENT	Y	N
1. Is the funding base diversified?		
2. Can the organization attract the type of donors they seek? Individual donations, gifts, corporate gifts and corporate foundation funds?		
3. Is the organization meeting its local government grants funding goals?		
4. Is the organization meeting its national government grant funding goals?		
5. Is the organization meeting its private funding goals?		
6. Does the organization have the technology and skills to support the fund development?		
7. Is the gift recording system effective and efficient?		
8. Is there a process for setting annual fundraising goals?		
9. Does the board drive the fund development function?		
10. Does the organization have the ability to consistently meet fundraising goals?		
11. Is there a development plan?		
12. Is there a development staff or other individuals dedicated to pursuing funding?		
13. Does the organization have access to individuals with proposal writing expertise?		
14. Does the organization have individuals with funding research skills?		
15. Do events consistently net at a sufficient benefit to justify the effort?		
16. Has there been board training in fund development?		
17. Is there board involvement in funding prospect identification?		
18. Is there board involvement in individual donor solicitation?		
19. Is there non-board volunteer support for fundraising efforts?		
20. Are board members good spokespersons for the organization?		

P.U.L.S.E. LEADERSHIP SELF CHECK

**"CHANGE BEFORE
YOU
HAVE TO."** -JACK
WELCH

F. BOARD – KEY FUNCTIONS/DEVELOPMENT/GOVERNANCE	Y	N
1. Do Board members understand their legal duties?		
2. Is there a cohesive Board recruitment/succession process?		
3. Does your organization have regular Board development trainings?		
4. Does the Board understand its role in the fund development process?		
5. Does the Board take an active role in raising funds?		
6. Do Board members understand how to cultivate relationships with major donors and other supporters?		
7. Do Board members actively cultivate relationships with major donors and other supporters?		
8. Do Board members contribute financially to the organization?		
9. Do Board members actively support the organization's programs and events?		
10. Do Board members receive regular financial reports that are clear, accurate and useful?		
11. Do Board members understand how to use financial reports for governance purposes?		
12. Do Board members understand the organization's mission and vision and can they articulate them?		
13. Can Board members succinctly and persuasively articulate the organization's mission and vision? (Elevator Pitch.)		
14. Do Board members critically review and question financial reports?		
15. Are there clear policies about board conflicts of interest?		
16. Do board members understand and meet the time commitment necessary to carry out their duties?		
17. Does the board understand the appropriate relationship with the staff?		
18. Is the board proactive with respect to the direction and strategy of the organization?		
19. Does the board understand the needs of the communities the organization serves?		
20. Does the board understand its responsibility it supervisory role relating to the Executive Director?		

P.U.L.S.E. LEADERSHIP SELF CHECK



A. ORGANIZATIONAL PURPOSE SCORE: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

B. PROGRAM PLANNING AND EVALUATION SCORE: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

C. COMMUNICATIONS SCORE: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

P.U.L.S.E. LEADERSHIP SELF CHECK

D. MARKETING/PUBLIC RELATIONS SCORE: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

E. FUND DEVELOPMENT: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

F. BOARD – KEY FUNCTIONS/DEVELOPMENT/GOVERNANCE: (NUMBER OF YES RESPONSES)

Prescription

- 1.
- 2.
- 3.

NOTES:

