



WHAT IS IEJI's ORGANIZATIONAL ASSESSMENT?

After years of seeing Jewish nonprofit's critical needs around operations and organizational development, IEJI designed an organizational assessment to be a judgment-free, confidential process for nonprofits looking to better understand their strengths and sticking points. It's conducted by an experienced nonprofit professional to create a snapshot of your organization's development across several areas:

- Vision, Mission, Program
- Leadership/Professional Team
- Planning & Strategy
- Governance/Board of Directors
- Finance & Fundraising
- Legal & Operations

The professional guiding the assessment will capture your answers to a broad series of questions to determine the level of organizational development in each area (while taking into account your organizational age, growth trajectory, the mission of your organization), and make recommendations for where your organization might focus future capacity-building efforts to best achieve your mission and goals.

WHO IS IT FOR?

The assessment can help any nonprofit organization that has been operating for approximately one year. It is particularly valuable for start-up and growth stage organizations, but is helpful for almost any nonprofit organization, regardless of age, that is planning for growth, feeling 'stuck', or approaching important decisions and wants to pause to reflect on its operations and identify any potential areas that will be critical for its future success.

WHO FROM MY ORGANIZATION PARTICIPATES?

While recognizing that some younger nonprofits might have different staffing structures, usually the lead professional who manages the organizations day to day operations (it might be an Executive Director, founder, or equivalent team member), often joined by a lay advisor or Board Chair, is involved in the in-depth conversation with the facilitator. We can discuss which staff members and lay leaders might be involved, depending on what would make the most sense for your organization's needs at this moment in its development.

WHAT'S THE END PRODUCT AND WHAT DO I DO WITH IT?

You'll receive a report with a snapshot of your organization's development in each of the assessment areas and recommendations for what your organization can do in the short- and medium-term to become more effective. Your facilitator will meet with you to discuss the report findings and help you think through next steps. Organizations have used the report as a starting point for strategic board conversations, as background for onboarding for new board members and staff, as a precursor to strategic planning, and as groundwork for grant requests. It can be a powerful tool for determining or confirming organizational priorities.

WHAT'S THE COST AND TIME COMMITMENT?

The assessment is available for \$1,800. We encourage organizations to reach out if you're curious about the process, even if you're not sure it's the right time for your organization to



invest in this work. The assessment is meant to help you jumpstart your work; and some organizations find they can obtain funding once they are clear on whether and why it's the right time to undertake this analysis. Plus, it's a quick process that leads to tangible next steps. The total participant time is approximately six hours and generally, the entire process is complete within 3-4 weeks. Participants will need to participate in a series of meetings (30 minute kickoff, two 90 minute interviews, and one 60 minute follow-up to discuss the report). Organizations will also need to set aside time to review the final report prior to the discussion with the facilitator about the report and its recommendations.

ABOUT IEJI

The mission of Incubator for Emerging Initiatives is to empower individuals and organizations developing substantive, innovative Jewish engagement or educational initiatives to succeed. We envision a Jewish community where Jewish innovators have the robust encouragement and support to have a sustained and powerful impact on Jewish life. To that end, we are committed to nurturing the success of the people and programs who are working to make a difference in the Jewish community. IEJI offers fiscal sponsorship, coaching, and consulting services.

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