

North Star Self-Assessment



North Star #1: Commitment to Outcomes

Establishing Social Impact Targets

1	2	3	4	5	
<i>We do not track annual social impact objectives</i>	<i>Our reports to funders describe our annual social impact objectives</i>	<i>We establish social annual impact objectives independently of our funders</i>	<i>We use industry-recognized social impact indicators for annual goals</i>	<i>We engage third-party evaluators to help us establish and track annual social impact goals.</i>	
<i>Action Plan:</i>					

Tools/Management and Information Systems (MIS)

1	2	3	4	5	
<i>We use MIS or ad hoc tools to manage service delivery data, but do not aggregate data for analysis</i>	<i>We periodically query our MIS for aggregated data for funders</i>	<i>We use aggregated MIS data for assessment at monthly or quarterly supervisory meetings.</i>	<i>We are readily able to aggregate data across data systems to conduct queries</i>	<i>We are readily able to aggregate data across data systems and have a plan for continuing investment in data tools.</i>	
<i>Action Plan:</i>					

Tracking Social Impact Targets

1	2	3	4	5	
<i>We do not track social impact objectives</i>	<i>We review progress annually.</i>	<i>We incorporate social impact reviews into monthly or quarterly supervisory meeting</i>	<i>We review social impact at supervisory and staff meetings on a monthly or quarterly basis</i>	<i>We review social impact monthly or quarterly as part of a continuous improvement process.</i>	
<i>Action Plan:</i>					

Assessing and Evaluating Social Impact Targets

1	2	3	4	5	
<i>We do not generally assess social impact of programs</i>	<i>We episodically undertake internal evaluations our work.</i>	<i>We episodically engage third-party evaluation partners to assess our work.</i>	<i>We have a staffed function that manages assessment processes.</i>	<i>We have an evaluation partner AND a staffed function to manage assessment processes.</i>	
<i>Action Plan:</i>					

Overall Grade: _____

North Star #2: Capacity for Innovation

Innovation Awareness

1	2	3	4	5	
<i>We do not have a ready awareness of innovation imperatives</i>	<i>We rely on our trade associations to surface trends.</i>	<i>Staff and board members actively seek and share competitive intelligence and industry trends</i>	<i>We have systems and processes for making actionable competitive intelligence and industry trends</i>	<i>We are considered an industry leader and are regularly consulted by others for industry intelligence and assessment</i>	
<i>Action Plan:</i>					

Innovation Road Map

1	2	3	4	5	
<i>Innovation in the organization is ad hoc and non-systematic. There is no regular forum for assessing innovation requirements.</i>	<i>We use staff and board meetings to foster a general understanding of key innovation imperatives.</i>	<i>We have a regularly updated written road map describing innovation needs and plans for the organization.</i>	<i>This roadmap is linked to operations, technology, capacity building, and financial plans for the organization.</i>	<i>Financial resources have been identified to support the innovation road map.</i>	
<i>Action Plan:</i>					

Partnerships and Ecosystem Development

1	2	3	4	5	
<i>We have not identified partners with whom to pursue an innovation agenda</i>	<i>We rely on trade association fora to discuss innovation opportunities</i>	<i>We have one or more MOUs that allow us to pursue innovation strategies with partners</i>	<i>Innovations from the MOUs have enabled us to expand business opportunities and deepen social impact</i>	<i>We have a pipeline or plan of innovation partnerships to develop in the next 24-36 months.</i>	
<i>Action Plan:</i>					

Overall Grade: _____

North Star #3: Partnerships, Mergers/Acquisitions, Networks

Merger/Acquisition and Partnership Strategy

1	2	3	4	5	
<i>We have not executed on a significant partnership opportunity and do not have a partnership or network strategy</i>	<i>We understand our core capabilities and weaknesses and assess partnership opportunities against this understanding</i>	<i>We proactively seek partnership opportunities based on this assessment</i>	<i>We have used this assessment to create a partnership strategy for the organization</i>	<i>We have attached business goals to the partnership strategy</i>	
<i>Action Plan:</i>					

Execution of Mergers/Acquisitions and Partnerships

1	2	3	4	5	
<i>We have not executed on a significant partnership opportunity</i>	<i>We treat the development of each partnership opportunity separately</i>	<i>We have identified staff in the organization who are responsible for seeking potential partnerships</i>	<i>We have due diligence and funding protocols for responding to partnership opportunities</i>	<i>We have a reputation for smart, collegial, and efficient partnership execution</i>	
<i>Action Plan:</i>					

Partnership Management

1	2	3	4	5	
<i>We have not executed on a significant partnership opportunity</i>	<i>We have executed on partnerships, but without articulated goals</i>	<i>We have identified goals for each partnership engagement</i>	<i>We regularly assess partnership performance against those goals</i>	<i>We have identified learnings from our partnership work that informs how we pursue partnerships</i>	
<i>Action Plan:</i>					

Overall Grade: _____

North Star #4: Financial Policies and Practices

Business Assessment

1	2	3	4	5	
<i>We manage the bottom line of organization</i>	<i>We manage margins for individual revenue streams or programs</i>	<i>We understand the interplay of different revenue streams and understand how differential margins leads to cross-subsidy</i>	<i>We regularly use that analysis to assess the viability of individual lines of business</i>	<i>We have made the decision to exit at least one line of business in the last three years</i>	
<i>Action Plan:</i>					

Risk: Scenario Planning/Program Continuity

1	2	3	4	5	
<i>We have not assessed risks of the organization</i>	<i>We assess risks facing us in limited time windows (e.g. for a particular budget year)</i>	<i>We have assessed risks facing the organization across three or more years</i>	<i>We have developed mitigation plans for the risks and done scenario planning</i>	<i>We have used scenario planning to adjust financial policies or plans</i>	
<i>Action Plan:</i>					

Financial Stability

1	2	3	4	5	
<i>We do not have financial targets outside of the operating budget</i>	<i>We have established targets for key financial ratios, which are reported regularly to board and finance committee</i>	<i>We have contingency plans to address significant variances</i>	<i>We have benchmarked our financial performance against other organizations like ours</i>	<i>We have used this benchmarking process to re-assess business or financial practices</i>	
<i>Action Plan:</i>					

Financial Expertise and Oversight

Members of our finance committee know the difference between direct/indirect and allowed/disallowed costs.
 At least one finance committee meeting each year is dedicated to an assessment of organizational risks.
 The organization employs staff or has ready access to advisors with a range of for-profit and non-profit financial management.
 The organization has undertaken a full cost accounting exercise for its largest lines of business in the last three years.
 The CFO is a member of the management team.

1	2	3	4	5	
<i>One or fewer of the above is true</i>	<i>Two are true</i>	<i>Three are true</i>	<i>Four are true</i>	<i>All are true</i>	
<i>Action Plan:</i>					

Overall Grade: _____