Worksheet: Organizational Assessment Tally Sheet

Once key staff and leaders in your organization have completed the Organizational Assessment and you have collected their completed Assessment forms, you can use this Tally Sheet to compile their ratings and comments into one document in preparation for a conversation about the results of the Organizational Assessment.

Here's how to use the Tally Sheet.
1) Collect all the completed Organizational Assessments.
2) One by one, add in each person's numerical ratings in the corresponding column for each statement. Note that in the charts below, we've created space to record the responses of up to five participants. If more people in your organization have completed the assessment, you will need to add columns.
3) Take note of the overall themes raised in their open-ended comments and write these down.
4) Identify the sections where your organization has an overall high rating.
5) Identify the sections where your organization has an overall low rating.
6) Identify the sections where there is a lot of diversity among the responses (some people rated statements as 1s while others rated the same statements as 5s.)
7) Refer back to the Organizational Assessment itself for ideas on how to discuss your findings.
8) Ask everyone who completed the Organizational Assessment to come prepared to discuss their comments and answers to the open-ended questions, since you will not be able to fully capture those comments on this tally sheet.

Key:
1 = No, this does not describe our organization at all. We need a lot of work in this area.
2 = This describes our organization a little bit
3 = This describes our organization somewhat. We could stand to improve.
4 = This is a fairly accurate description of our organization
5 = This is a very accurate. We're strong in this area.

Section A: Theory of Change

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
A1	Our organization has a clearly articulated theory of change.						
A2	Most people in the organization can easily explain our theory of change.						
A3	We use our theory of change to inform decisions around our programs and campaigns.						
A4	We use our theory of change to orient new members and staff.						
A5	Our theory of change includes an analysis that it is important to build a broad base of domestic workers.						
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 5:							
Summary of comments:							

This document is part of a set of organizing resources for affiliates of the National Domestic Workers Alliance.

The full set of resources can be found at http://organizing.domesticworkers.org

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Section B: Researching Our Base

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
B1	We've done research (surveys, focus groups, field scan, regular outreach, etc.) that tells us about the conditions and needs of domestic workers in our communities.						
B2	We have analyzed the data we have collected.						
B3	We use the results of this research to inform decisions around our programs and campaigns.						
B4	We are confident that our programming accurately reflects the needs of our base.						
	Overall Section Average. Add up all the averages in the far right column, and then divide that number by 4:						
Summary of comments:							

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Section C. Membership Structure

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
C1	We have a clear definition of membership.						
C2	We know how many members we have.						
C3	It's easy for domestic workers to become members of the organization.						
C4	Our membership structure includes opportunities for workers to take on greater leadership roles, and a clear system for how they will be able to do so.						
C5	Our members pay dues.						
C6	Our membership is growing.						
C7	We stay in touch with members, including those who are not currently active, in order to keep them connected with the organization.						

C8	We have specific, transparent, and democratic ways for members to make decisions about the work and priorities of the organization.						
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 8:							
Summary of comments:							

Section D: Supporting Powerful Leaders and Effective Teams

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
D1	We have a Lead Organizer on staff who can develop and support the execution of a domestic worker organizing program.						
D2	We have staff dedicated to domestic worker organizing.						

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D3	We provide good training and support for the staff who are dedicated to domestic worker organizing.							
D4	There are clear and specific roles for worker-leaders to play on a volunteer basis in the organization.							
D5	We have good systems in place for worker leaders to be trained to take on those roles.							
D6	Outreach and follow-up is mostly done by worker leaders, not paid staff.							
D7	Worker leaders play a central role in peer support responsibilities (like support groups, peer counselling and facilitation of membership meetings).							
D8	We have good systems in place for supervision of staff and worker leaders.							
D9	Our staff and leaders stick around the organization for a long time. Their role is sustainable. People are not burned out or overly frustrated by internal dynamics.							
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 9:								
Summary of Comments:								

Section E: Outreach and Follow-up

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
E1	Our organization prioritizes building a large domestic worker membership and a base of strong worker-leaders.						
E2	There is consensus among our Board that growing our membership base is a priority.						
E3	There is consensus among staff that growing our membership base is a priority.						
E4	We have annual, quarterly and monthly outreach goals.						
E5	We generally reach the outreach goals we set.						
E6	We have resources (staffing and time and money) dedicated to bringing more domestic workers into our organization.						

E7	Our programs are structured in a way that will allow us to grow and incorporate many new members into the organization.						
E8	New domestic workers regularly come into contact with our organization						
E9	We treat outreach and follow-up as a system, and dedicate time in our work schedules for both.						
E10	We've done mapping in our community that tells where and how to find domestic workers.						
E11	We follow up with all new contacts within 48 hours of reaching them.						
E12	We have a trained Outreach Team made up of worker leaders						
E13	We have a strong and inspiring rap that we use to recruit new members.						
E14	We have a high retention rate when we succeed in bringing a new contact into the organization.						

E15	We have good systems for tracking data on our contacts and members, and the right people in the organization are trained to use that system.						
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 15:							
Summary of Comments:							

Section F: Program Design

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	**AVERAGE** (add up all the scores and divide by the # of people who responded.)
F1	We have regular meetings held at the same time each month.						
F2	We feel confident that the programs we offer are the right mix of programs to attract and retain members.						
F3	Our programs include political education on the domestic worker movement.						

F4	Our programs include political education on intersections between different systems of oppression (sexism, racism, classism, homophobia, etc.).							
F5	Our organization is clear on what rights domestic workers have in our state and city.							
F6	Our programs help workers know their rights on the job and feel more confident exercising them.							
F7	Our programs include leadership development trainings.							
F8	Our programs include opportunities for domestic workers to connect with each other, provide peer support, and form community.							
F9	Our programs are transformative. Workers are able to see themselves, their potential and their own leadership in a new way as a result of their participation in our programs.							
F10	We have both programs that attract new people to the organization and programs that support leadership development of active members.							
F11	Workers who are recipients of the services our organization offers usually become members of the							

	organization. (Write in N/A if your organization doesn't provide direct services.)						
F12	The services our organization offers generate revenue that supports our organizing. (Write in N/A if your organization doesn't provide direct services.)						
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 12:							
Summary of Comments:							

Section G: Digital Organizing

#	Statement	Person 1	Person 2	Person 3	Person 4	Person 5	AVERAGE (add up all the scores and divide by the # of people who responded.)
G1	We have recognized that we need to use technology to communicate with more people than we are able to reach one-on-one.						

G2	We make use of social media to promote our organization and encourage workers to get involved.						
G3	We use technology to communicate with our leaders in a way that's efficient and effective.						
G4	We use technology to communicate with our contacts and potential members in a way that's efficient and effective.						
G5	We have a digital organizing plan.						
G6	We have staff who are tasked with carrying out our digital organizing plan, and have the training and skills that they need to be able to do so.						
G7	Our members use technology to communicate with each other related to the work of the organization.						
G8	We use technology to build connection and community with our base.						
Overall Section Average. Add up all the averages in the far right column, and then divide that number by 8:							
Summary of Comments:							

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NATIONAL DOMESTIC WORKERS ALLIANCE

Responses to question 5: Which of the above areas should be the top 3 priorities for your organization?

Section	# of people who identified this area as one of their top three priorities
Section A: Theory of Change	
Section B: Researching the Base	
Section C: Membership Structure	
Section D: Maximizing Staff and Leaders	
Section E: Outreach and Follow-up	
Section F: Program Design	
Section G: Digital Organizing	

Additional Notes: