



## JUMP Capacity Building Initiative Organizational Self-Assessment Overview

The Journey to Unlock Management Potential (or JUMP) Initiative Organizational Self-Assessment allows organizations to reflect on their organizational capacity in areas identified by research as impacting organizational sustainability.

While the assessment is ideally completed as part of the application phase of JUMP, it can be used as a stand-alone instrument. To date, almost 800 respondents from 80 organizations in the Tampa Bay area have participated.

The JUMP Assessment, based on the work of The Finance Project, has been adapted to include new findings on what factors impact sustainability and includes the following focus areas:

- Vision
- Results Orientation
- Strategic Financing
- Broad-based Community Support
- Key Champions
- Adaptability
- Leadership
- Capacity Strengths & Challenges

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Organizations completing the self-assessment may or may not choose to continue with the application process for JUMP. Those completing the self-assessment but not participating in the JUMP Capacity Building Initiative are strongly encouraged to attend the Self-Assessment Review Session on **October 4, 2013** from 9:30 – 11:30 AM and a Strategic Refresh Session at the Collaborative Labs on **October 18, 2013** from 8:30 AM - 12:00 noon or 1:00 PM - 4:30 PM. *See the Strategic Refresh Session document for more information.*

Organizations selected to participate in JUMP Cohort 4 must attend the Self-Assessment Review Session on **October 4, 2013** from 1:00 – 3:00 PM.

During the self-assessment review session, organizations will learn how to interpret the findings and use the report, obtain one-on-one technical assistance from JUMP planning team members and receive information on local capacity building resources. During the strategic refresh sessions, organizations will have an opportunity to

Past participants have found the self-assessment to be helpful regardless of whether or not they participated in the JUMP Capacity Building Initiative.

The following benefits have been reported:

- Assessment concepts were relevant to their organization.
- Increased their awareness about organizational capacity.
- Improving in the lower scoring areas would improve their organization.
- Use of the report as a discussion piece at a board or staff meeting.

## Frequently Asked Questions about the Online Assessment Process

### **Who should take the self-assessment?**

Multiple representatives from the organization should complete the assessment, but at least five, including the Executive Director/CEO, at least one Board Member, and at least one other staff member or volunteer.

### **How is the self-assessment designed?**

The assessment includes both quantitative ratings and open-ended questions and is completed online via a secure password protected site.

### **How will results be communicated?**

Each organization receives a confidential report by email or in person approximately a month after the completion deadline. The report includes aggregate results for the organization (individual responses are not provided) and recommendations for action steps, based on the ratings and open-ended comments.

### **I'm having trouble pulling up the self-assessment. What should I do?**

The most common problem encountered while trying to complete the assessment is entering the organization name where the password should be entered. You will need a password to complete survey. The password is included in the instructions provided to you at the information session.

Once you are at the survey, you will choose your organization name from a drop down menu. Be sure to choose the right name as it is used to create a report for your organization.

The second most common problem is that your browser does not allow you to click a link, or you try to access the survey software from its home page. The easiest way to access the survey is to go to [www.tampabayhealth.org](http://www.tampabayhealth.org) and click on the link for the JUMP Assessment/Application located in the upper right hand corner of the home page (Recent News). You may also visit <http://tampabayhealth.org/initiatives/jump-capacity-building/> and click on the Assessment/Application link on the page.

### **Should new board or staff members participate in the assessment?**

Yes, they can choose "not sure" if they have not participated long enough with the organization to have an opinion, and then note that they are a new board or staff member in the comments section that follow each question.

### **Can you tell me who from my organization has completed the self-assessment?**

No, all the self-assessments are anonymous; I can only tell you how many people have completed the assessment, not who.

### **I don't know if you got my self-assessment or not.**

As you complete each page, it is saved in the database. After the last question, you will see a page that describes the next steps. Once you click *done* at the bottom of that page, you will see a thank you screen. You will not receive an email confirmation as the self-assessment is anonymous.

### **What if one of our board or staff members does not have internet access?**

A hard copy assessment can be sent directly to the individual to complete and return directly to the independent evaluator to ensure confidentiality. Please send the person's mailing address and/or fax number to Dr. Robertson at [info@snrobertson.com](mailto:info@snrobertson.com).