



Key focus areas for

Growing Organizations

Episode 4: Evaluation Systems

ABOUT RIVER NETWORK

River Network grows and strengthens a transformational national network of water, justice, and river advocates.

We envision a powerful and inclusive movement that ensures abundant clean water for all people and nature to thrive. We believe that joy and hope for our planet flows through our rivers.

Meet the network and search our Water Protectors Map on our website!
rivernetwork.org ←



IN PARTNERSHIP

This work is produced by River Network with collaborative support from the Hudson River Watershed Alliance.

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Department of
Environmental
Conservation

Hudson River
Estuary Program

ORG GROWTH CHECKLIST

For established / growing groups



COMMUNICATIONS / MARKETING

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- *What are the key messages your group wants to communicate with the public AND are these messages aligned with your mission statement?*
- *Who speaks on behalf of the organization / whose voice is represented?*
- *How do you define the reach of your communications (is there a key audience)?*
- *Where can staff/volunteers access marketing assets (logo, boilerplate language, branding guidance, images)?*

River Network published an [Inclusive Communications Guide](#) - use it to better understand how your communications can be more accessible, welcoming, and ethical.

FINANCIAL & LEGAL INFRASTRUCTURE

When an organization starts receiving more funding and/or engaging more community members, there are additional financial and legal risks. Thinking through how to manage additional resources and risk is a statutory task for an organization's leadership team.

- *Does the organization carry insurance, or is it listed as additionally insured on another group's insurance policy?*
- *Who is responsible for bookkeeping, reporting, and other fund management?*
- *What internal controls exist to avoid misuse of funds?*
- *Where can staff/volunteers find information about donors and funders?*
- *Are fundraising files up-to-date and accessible to those who need them?*

For more information on insurance coverage, reference information from a trusted partner: [Nonprofit Insurance Alliance](#).

LEADERSHIP: POLICIES & PLANNING

Various elements come together to ensure smooth and sustainable leadership transitions: managing workloads, in-filling capacity, handing off information and duties, and more can be anticipated and well-planned for.

- *Does the organization have by-laws that name how leadership is added or removed from the organization? Or, that name a succession of leadership?*
- *How is/are the leader(s) held accountable for their project file management and record-keeping?*
- *Knowing that healthy turnover of leadership happens every 5-8 years in most groups, are workplans written to accommodate distributed workloads?*
- *Are staff/volunteers exposed to professional development opportunities and/or given opportunities to practice leadership skills, before they might be called upon to serve?*

Check out [this webinar by consultant Karen Strong](#) (Strong Outcomes) from the 2021 HRWA Annual Watershed Conference.

EVALUATION SYSTEMS

Evaluation is an often overlooked tool when considering workplanning and leadership needs. Having a way to constructively evaluate the organization's progress toward its mission, its leadership, and its value in the community will help guide work and identify needs in the future. Evaluation metrics also support fundraising and engagement goals.

- *How are you tracking progress made toward the organization's mission?*
- *What metrics help you understand the organization's impact?*
- *What questions help you understand the effectiveness of your leadership team?*
- *How are volunteers or staff being evaluated to understand their impact?*

Not sure where to start? Check out this [sample board/leadership evaluation template](#), written for nonprofit boards of directors, but easily adjusted for any group.

COMMUNITY ASSESSMENT

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TOPICS TODAY:

- Internal evaluations: leadership and group/org-wide
- Volunteer evaluations
- External evaluation of projects and programs



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NOT A WASTE OF TIME!

WHO?

Board
Fundors
Supporters
Volunteers
Internal Leadership

WHAT?

Progress on:
-Programs
-Projects
-Operations

WHY?

Deeper Engagement
Community Buy-in
Internal Motivation
Better Dialogue
Celebration!

LEADERSHIP EVALS



WHO

Board of Directors

Board Chair

Eval Committee

Leader

Board Chair &
Leader

WHAT

Establish evaluation
process

Initiate evaluation
process

Collect information

Evaluate self

Complete
evaluation

HOW

Write policy
including when,
how, and who

Refer to policy,
convene eval
committee

Surveys
Interviews

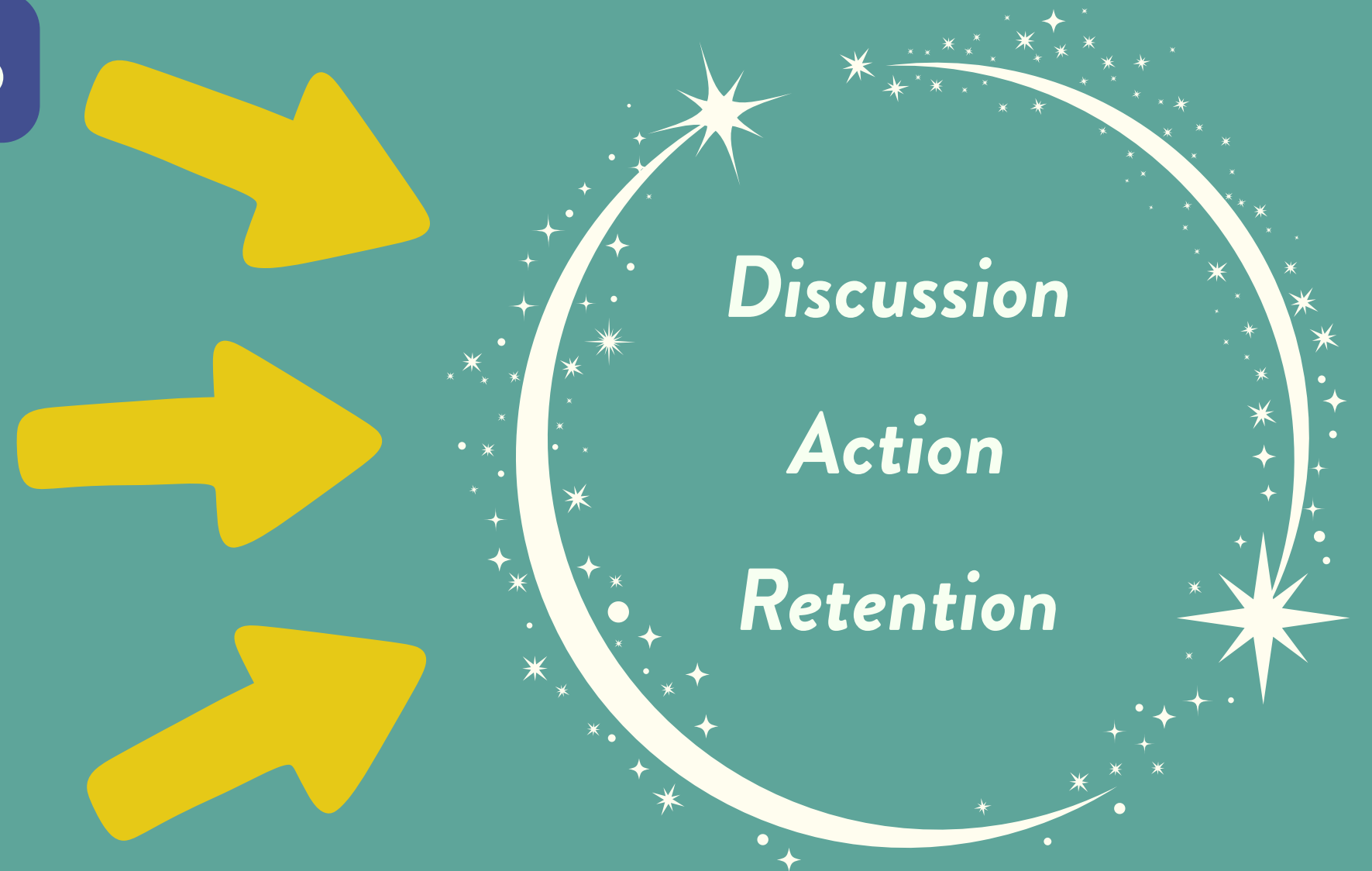
Self-evaluation
form provided by
Board

Discussion,
refer to policy for
record keeping

BOARD/TEAM EVALS

Sample Question Types:

- General “pain points” within the group
- Obstacles to participating fully
- Success of meetings
- Ease of information access
- Skills the Board possesses / lacks
- Confidence acting in specific roles
- Professional development needs
- Enjoyment in the work



ORG/GROUP EVALS

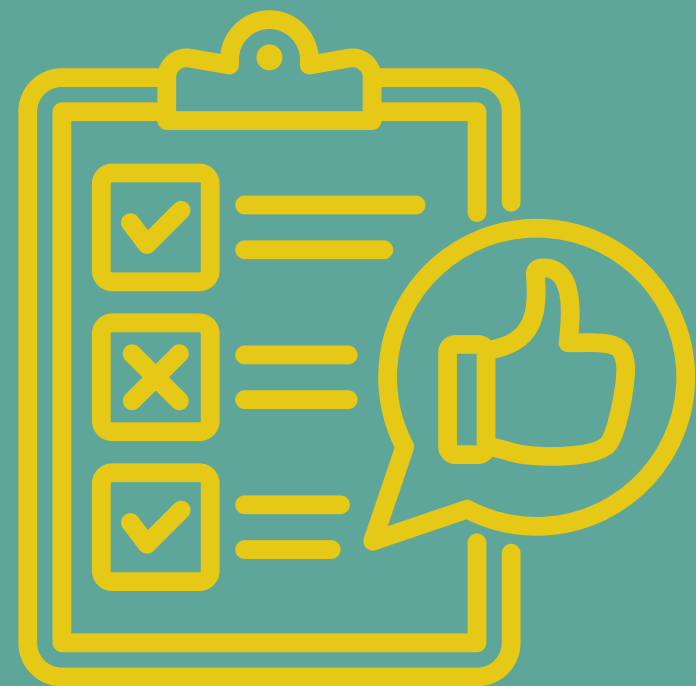
Pull Info From:

- Workplans
- Grant Proposals
- Mission/Vision/Values



Include Benchmarks For:

- Programming
- Projects
- Org Health & Growth



Use Tools Such As:

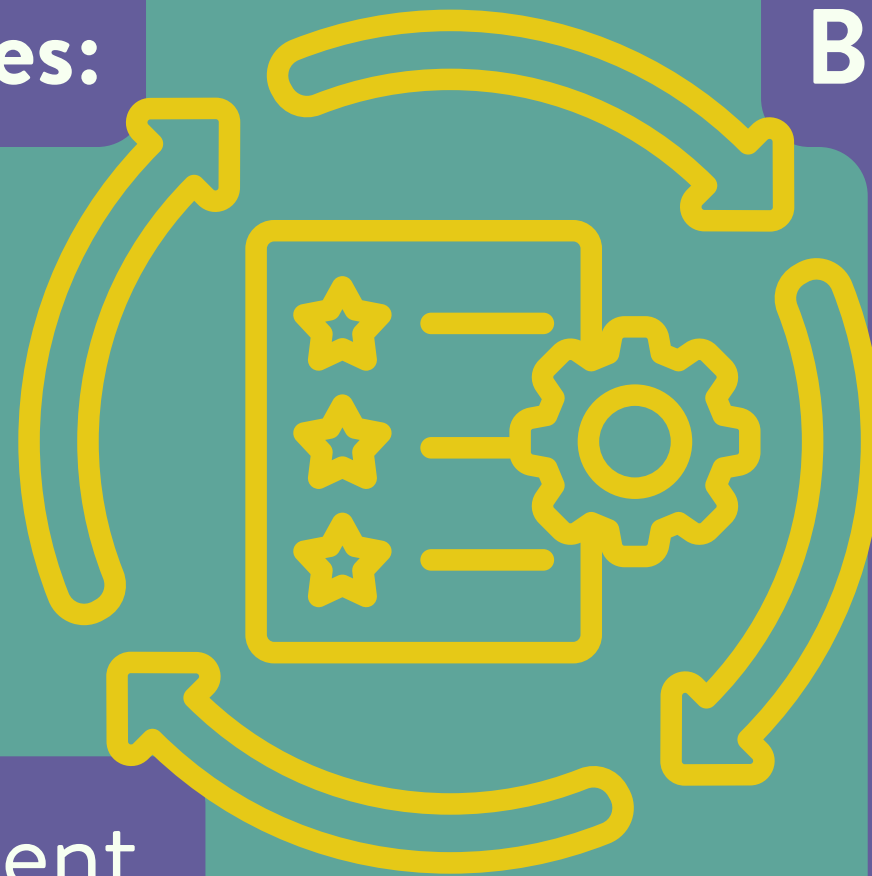
- Program surveys
- Membership polls
- Virtual polls
- Communications metrics
- Inventories or Org Assessments
- Conversations



VOLUNTEER EVALS

Incorporate these question types:

- Benefits/enjoyment
- Ease of participation
- Knowledge/skills gaps
- Communication
- Further/different engagement



Because...

- Markets volunteering to others
- Identifies accessibility needs
- Increases confidence
- Enables participation
- Builds a leadership pipeline

TOO MANY EVALS?

Combine & conquer to avoid survey fatigue, depending on the size and structure of your group.

- Spread evaluations out
- Rotate responsibility for performing/recording them
- Streamline and assign intentionally

HELPFUL METRICS

Qualitative	Quantitative
Internal culture	Number of volunteers/attendees
Quality of experiences	Volunteer hours worked
Feelings or perceptions	Trees planted, acres restored, pounds of litter picked up
Stories about behavior change	Signatures on a letter, petition
Relationships/Partnerships	Dollars raised

RECAP

- Types of evaluations
- Ways to collect feedback
- Types of metrics

check out this evaluation template
from the checklist



Sample Board Self-Evaluation

Section I – Evaluation of the organization's board

To what extent to you feel the Board follows these best practices for nonprofit boards? (1 = Low/Disagree. 5 = High/Agree)

		LOW				HIGH
	Board Activity	1	2	3	4	5
1.	The board operates under a set of policies, procedures, and guidelines with which all members are familiar.					
2.	The Executive Committee reports to the board on all actions taken.					
3.	There are standing committees of the board that meet regularly and report to the board.					
4.	Board meetings are well attended, with <u>near</u> full turnout at each meeting.					
5.	Each board member has at least one committee assignment.					
6.	Nomination and <u>appointment</u> of board members follow clearly established procedures using known criteria.					
7.	Newly elected board members receive adequate orientation to their role and what is expected of them.					
8.	Each board meeting includes an opportunity for learning about the organization's activities.					
9.	The board follows its policy that defines term limits for board members.					
10.	The board fully understands and is supportive of the strategic planning process of the organization.					
11.	Board members receive meeting agendas and supporting materials in time for adequate advance review.					
12.	The board adequately oversees the financial performance and fiduciary accountability of the organization.					
13.	The board receives regular financial updates and takes necessary steps to ensure the operations of the organization are sound.					
14.	The board regularly reviews and evaluates the performance of the Executive Director.					
15.	The board actively engages in discussion around significant issues.					
16.	The board chair effectively and appropriately leads and facilitates the board meetings and the policy and governance work of the board.					

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THANK YOU!

Find more
information at
www.rivernetwork.org

*Explore membership, resources, and join
our newsletter & online community!*

