

Trajectory™

Nonprofit Organization

6/4/19



KEY INDICATORS FOR ALL GROUPS

This section provides information on how respondents from all groups perceive the overall performance of your organization over the last several years and their top leadership priorities for the future.

Overall Satisfaction

On the whole, I am satisfied with how things are in the organization.

Clearly agree	23%
On the fence	48%
Clearly disagree	29%

Overall Energy

It seems to me that the organization is just going through the motions, rather than being excited about

Clearly agree	26%
On the fence	39%
Clearly disagree	35%

Missional Progress

Over the past 3 to 5 years, the organization has been effective in making progress towards the fulfillment of its mission.

Clearly agree	47%
On the fence	37%
Clearly disagree	15%

Changes in Vision and Mission Statements

Significant alterations to the organization's mission are required to make the organization more effective.

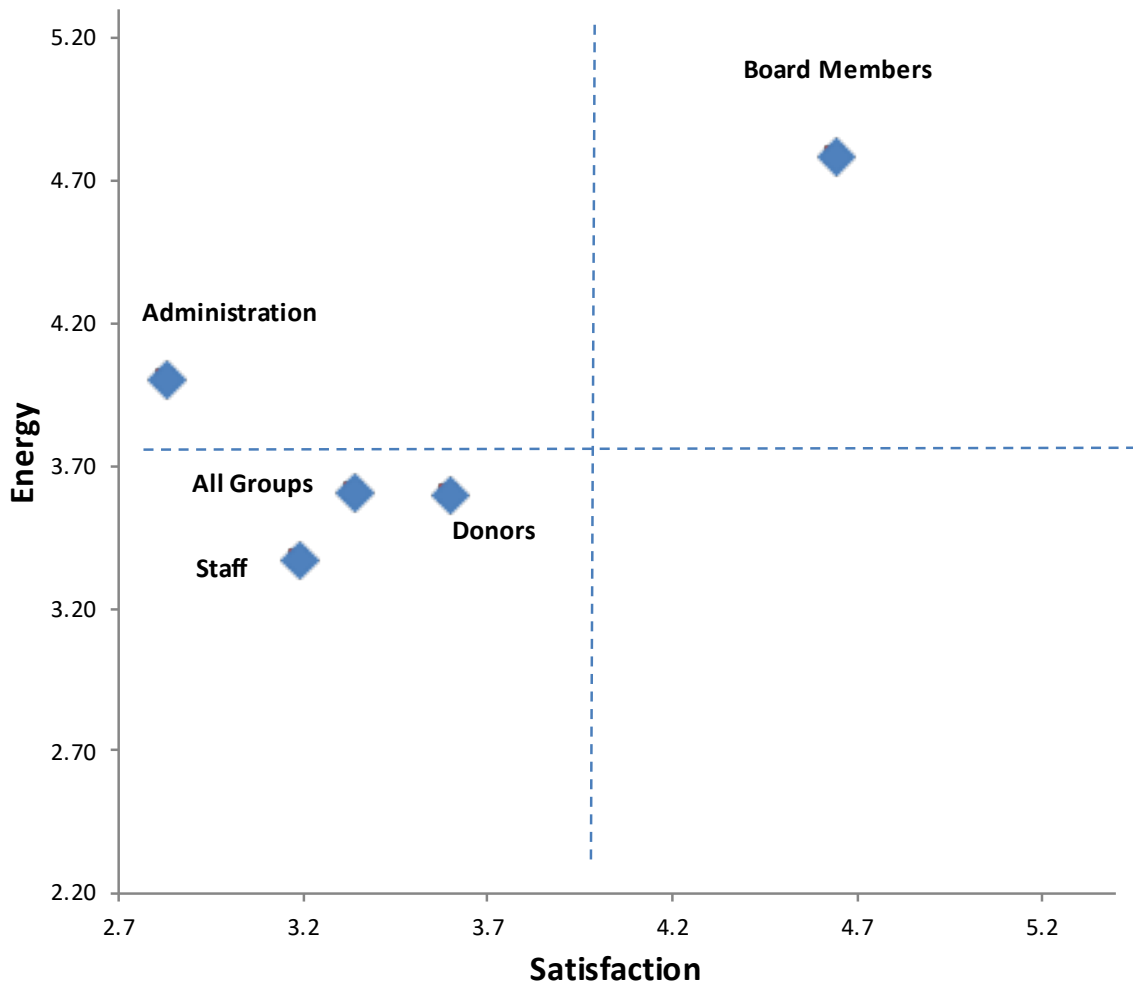
Clearly agree	35%
On the fence	35%
Clearly disagree	29%

Top Three Leadership Priorities

Where do you believe additional energy needs to be invested in the future?

- | | |
|--------|--|
| First | Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization. |
| Second | Improve the financial health of the organization through fund raising and philanthropic giving. |
| Third | Develop more effective and creative approaches to achieving the organization's mission. |

ENERGY-SATISFACTION MAP



The levels of satisfaction and energy have been found to be reliable indicators of the health and vitality of organizations. There are four quadrants on this map.

The **high energy-low satisfaction** quadrant is the chaos quadrant. Organizations tending toward this quadrant are often struggling to structure and channel their energy into a direction they feel good about.

The **low energy-low satisfaction** quadrant is the recovery quadrant. Organizations tending toward quadrant require major changes in order to regain a significant level of vitality and health.

The **low energy-high satisfaction** quadrant is the apathy quadrant. Organizations tending toward this quadrant have normalized a low level of vitality in the organization which enables them to be relatively satisfied.

The **high energy-high satisfaction** quadrant is the transformation quadrant. Organizations tending toward the upper right corner of this quadrant are sources of purpose and vitality.

DRIVERS OF SATISFACTION AND ENERGY

Not every question on the assessment is of equal importance to respondents. The more important questions are called drivers. A driver of satisfaction is a question that reliably predicts the overall satisfaction of respondents. If a respondent gives a higher score to a driver, it is very likely that he or she will also give a higher score to overall satisfaction. If a respondent gives a lower score to driver, it is likely that he or she will also give a lower score to overall satisfaction. (On negatively worded drivers, the relationship is reversed; a higher score results in a lower score on overall satisfaction.) The drivers of satisfaction listed below are unique to your organization. The higher the level of importance, the more critical the question is to how respondents feel overall.

Drivers of Satisfaction

The top five drivers of satisfaction are:

		Level of Importance
Driver #1	Leaders appear to do a good job making full use of the skills and abilities of the staff who work within the organization.	Very high
Driver #2	A positive atmosphere seems to prevail between those who are stakeholders (Boards, Clients/Customers, Donors) and staff members and/or leaders within the organization.	High
Driver #3	A positive, collegial atmosphere seems to prevail among those who work within the organization.	High
Driver #4	When I interact with staff and/or leaders in the organization, I become aware of a disturbing amount of conflict.	High
Driver #5	Programs and/or Projects receive adequate resources to accomplish their work.	High

Drivers of Energy

The top five drivers of energy are:

		Level of Importance
Driver #1	Leaders appear to do a good job making full use of the skills and abilities of the staff who work within the organization.	Moderate
Driver #2	The workload seems to be fairly shared within the organization.	Moderate
Driver #3	A positive atmosphere seems to prevail between those who are stakeholders (Boards, Clients/Customers, Donors) and staff members and/or leaders within the organization.	Moderate
Driver #4	A positive, collegial atmosphere seems to prevail among those who work within the organization.	Moderate
Driver #5	Programs and/or Projects receive adequate resources to accomplish their work.	Moderate

FUTURE PRIORITIES

Rank	Priority	Mean
First	Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization.	4.9
Second	Improve the financial health of the organization through fund raising and philanthropic giving.	4.4
Third	Develop more effective and creative approaches to achieving the organization's mission.	4.2
Fourth	Strengthen the organization's visibility and connections in the community.	4.1
Fifth	Improve the efficiency of the organization to make better use of existing resources.	4.0
Sixth	Develop balanced workloads for those working within the organization so that responsibilities are equitably shared	3.5
Seventh	Develop a new vision and strategic plan for the organization.	2.8

CRITICAL ABILITIES FOR THE NEXT LEADER

Rank	Critical Ability	Mean
First	Demonstrated ability to think and act with purpose and integrity	6.3
Second	Demonstrated ability as a leader	6.1
Third	Ability to recruit and retain a high quality, collaborative staff	5.8
Fourth	Demonstrated ability to foster trust in all aspects of the organization's work	5.6
Fifth	Ability to determine & implement program development	5.0
Sixth	Commitment to the organization's mission	4.8
Seventh	Significant success with fund raising	3.8
Eighth	Earned advanced degree	2.1

PERSONAL CHARACTERISTICS FOR THE NEXT LEADER

Rank	Personal Characteristic	Mean
First	Widely known for effective communication within an organization	4.8
Second	Widely known for effective communication in the larger community	4.2
Third	Outgoing and personally engaging with those in an organization	4.1
Fourth	Ability to innovate and take occasional risks for the sake of progress	3.5
Fifth	Tested by failure and/or disappointment	2.7
Sixth	Relies on traditional approaches to achieve objectives	1.6

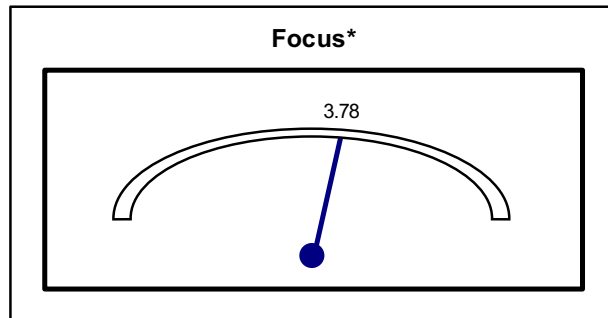
PERSPECTIVES

This section gauges the perspectives of respondents on a number of key issues. Some questions are positively worded. On those a larger mean is desirable. Other questions are negatively worded and a lower mean is preferred. The dashboards have been adjusted so that a higher score is always desirable (Negatively worded questions are indicated by a "*").

Focus

The organization is trying to support too many programs or projects.

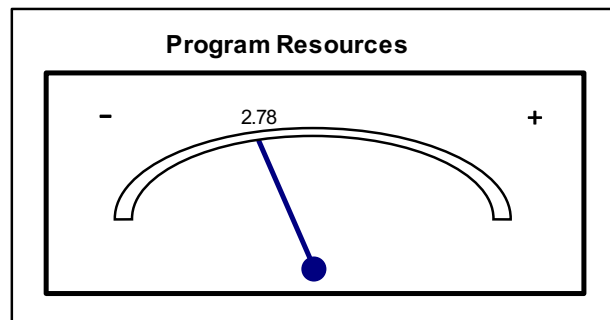
Response	Percentage
Strongly disagree	7%
Disagree	33%
Tend to disagree	22%
Tend to agree	20%
Agree	7%
Strongly agree	12%



Program Resources

Programs and/or Projects receive adequate resources to accomplish their work.

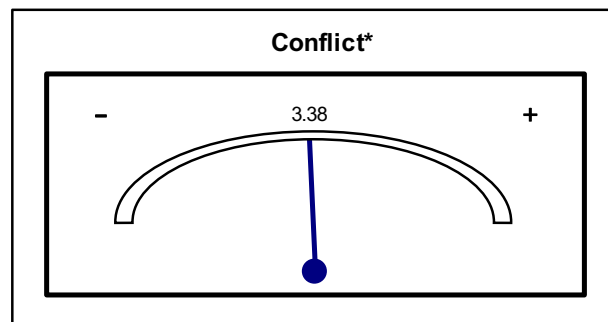
Response	Percentage
Strongly disagree	23%
Disagree	19%
Tend to disagree	31%
Tend to agree	14%
Agree	9%
Strongly agree	4%



Conflict

When I interact with staff and/or leaders in the organization, I become aware of a disturbing amount of conflict.

Response	Percentage
Strongly disagree	9%
Disagree	23%
Tend to disagree	14%
Tend to agree	21%
Agree	17%
Strongly agree	16%

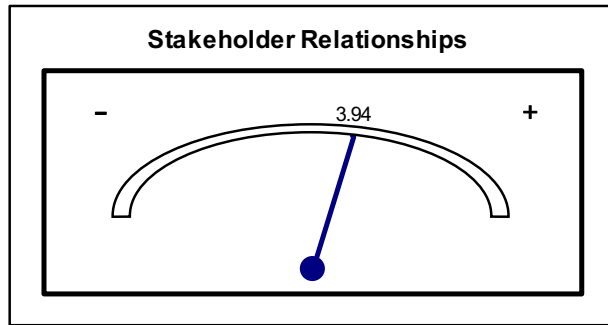


PERSPECTIVES

Stakeholder Relationships

A positive atmosphere seems to prevail between those who are stakeholders (Boards, Clients/Customers, Donors) and staff members and/or leaders within the organization.

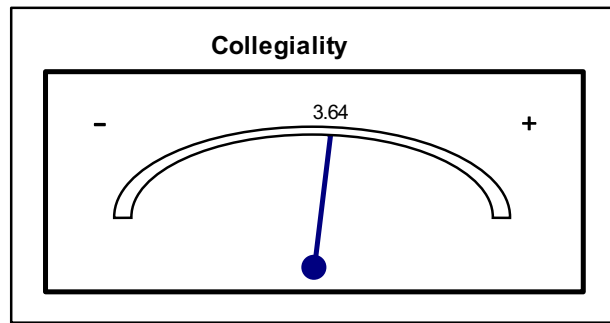
Response	Percentage
Strongly disagree	8%
Disagree	14%
Tend to disagree	11%
Tend to agree	27%
Agree	24%
Strongly agree	16%



Collegiality

A positive, collegial atmosphere seems to prevail among those who work within the organization.

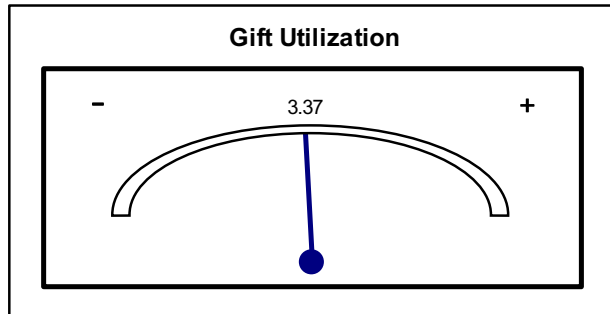
Response	Percentage
Strongly disagree	9%
Disagree	11%
Tend to disagree	26%
Tend to agree	21%
Agree	25%
Strongly agree	8%



Gift Utilization

Leaders appear to do a good job making full use of the skills and abilities of the staff who work within the organization.

Response	Percentage
Strongly disagree	14%
Disagree	18%
Tend to disagree	22%
Tend to agree	20%
Agree	18%
Strongly agree	8%

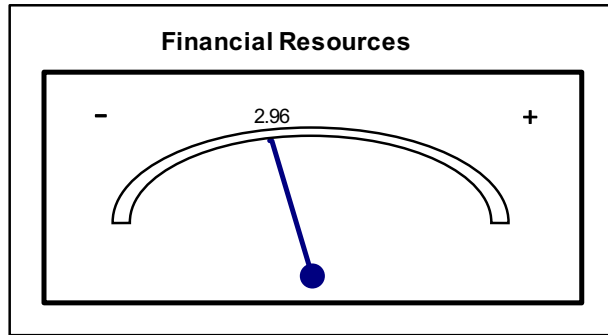


PERSPECTIVES

Financial Resources

The organization seems to have the financial resources it needs to accomplish its mission.

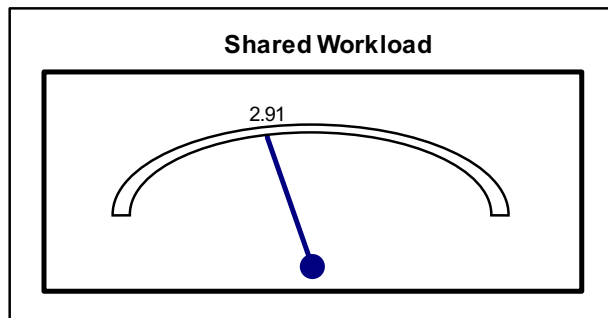
Response	Percentage
Strongly disagree	20%
Disagree	20%
Tend to disagree	24%
Tend to agree	19%
Agree	13%
Strongly agree	4%



Shared Workload

The workload seems to be fairly shared within the organization.

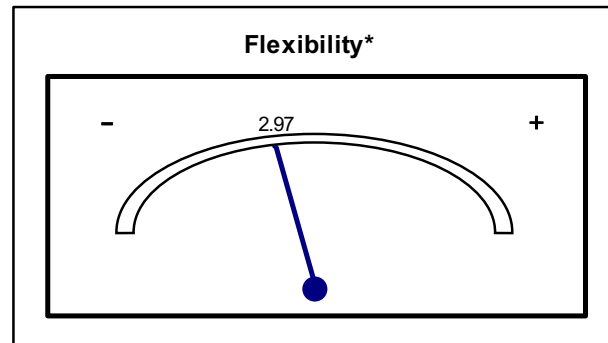
Strongly disagree	17%
Disagree	27%
Tend to disagree	24%
Tend to agree	17%
Agree	14%
Strongly agree	2%



Flexibility

The organization seems to stay very close to the traditional and established way of doing things.

Strongly disagree	4%
Disagree	10%
Tend to disagree	15%
Tend to agree	31%
Agree	26%
Strongly agree	13%



RESPONDENT CHARACTERISTICS

Role

Which category below best describes your relationship to the organization?

Response	Percentage
Board Members	10%
Administration	9%
Staff	75%
Donors	7%

Years of Affiliation

How many total years have you been affiliated with the organization?

Response	Percentage
One year or less	14%
2-4 years	21%
5-7 years	17%
8-10 years	9%
More than 10 years	39%

Number of Respondents

166

SUPPLEMENTAL QUESTIONS

Organizational Capacity

Do you believe those within the organization have the appropriate skills and abilities to meet the needs of the people they are trying to help.

Response	Percentage
Yes, absolutely	30%
Yes, somewhat	39%
Not to the extent I would like	20%
No, not at all	7%
Don't know	4%
Not applicable	0%

Personal Gift Utilization

In your experience with the organization do you believe your skills, interests, and abilities are thoughtfully considered?

Response	Percentage
Yes, absolutely	32%
Yes, somewhat	35%
Not to the extent I would like	26%
No, not at all	5%
Don't know	2%
Not applicable	0%

Future Priorities by Role

Board Members

First	Improve the financial health of the organization through fund raising and philanthropic giving.	5.07
Second	Develop more effective and creative approaches to achieving the organization's mission.	4.93
Third	Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization.	4.50
Fourth	Improve the efficiency of the organization to make better use of existing resources.	4.43
Fifth	Strengthen the organization's visibility and connections in the community.	3.86

Administration

First	Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization.	5.62
Second	Improve the financial health of the organization through fund raising and philanthropic giving.	5.31
Third	Improve the efficiency of the organization to make better use of existing resources.	3.85
Fourth	Develop balanced workloads for those working within the organization so that responsibilities are equitably shared	3.62
Fifth	Strengthen the organization's visibility and connections in the community.	3.54

Staff

First	Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization.	4.84
Second	Improve the financial health of the organization through fund raising and philanthropic giving.	4.32
Third	Develop more effective and creative approaches to achieving the organization's mission.	4.27
Fourth	Strengthen the organization's visibility and connections in the community.	4.21
Fifth	Improve the efficiency of the organization to make better use of existing resources.	3.94

Donors

First	Provide leadership that fosters the opportunity for staff to be engaged in shaping the future of the organization.	5.50
Second	Develop balanced workloads for those working within the organization so that responsibilities are equitably shared	4.70
Third	Improve the efficiency of the organization to make better use of existing resources.	4.40
Fourth	Develop more effective and creative approaches to achieving the organization's mission.	4.00
Fifth	Strengthen the organization's visibility and connections in the community.	3.60

Critical Abilities by Role

Board Members

First	Demonstrated ability as a leader	7.00
Second	Demonstrated ability to think and act with purpose and integrity	6.60
Third	Commitment to the organization's mission	5.70
Fourth	Ability to recruit and retain a high quality, collaborative staff	5.40
Fifth	Demonstrated ability to foster trust in all aspects of the organization's work	4.90

Administration

First	Demonstrated ability to think and act with purpose and integrity	7.50
Second	Demonstrated ability to foster trust in all aspects of the organization's work	7.10
Third	Demonstrated ability as a leader	6.20
Fourth	Ability to recruit and retain a high quality, collaborative staff	5.30
Fifth	Ability to determine & implement program development	4.60

Staff

First	Demonstrated ability to think and act with purpose and integrity	6.20
Second	Demonstrated ability as a leader	6.10
Third	Ability to recruit and retain a high quality, collaborative staff	5.90
Fourth	Demonstrated ability to foster trust in all aspects of the organization's work	5.50
Fifth	Ability to determine & implement program development	5.20

Donors

First	Demonstrated ability to foster trust in all aspects of the organization's work	6.00
Second	Demonstrated ability as a leader	5.90
Third	Ability to recruit and retain a high quality, collaborative staff	5.80
Fourth	Demonstrated ability to think and act with purpose and integrity	4.90
Fifth	Ability to determine & implement program development	4.50

Personal Characteristics for Next Leader by Role

Board Members

First	Known for accomplishing what is promised. A person of integrity	5.00
Second	Widely known for effective communication in the larger community	4.20
Third	Widely known for effective communication within an organization	4.20
Fourth	Outgoing and personally engaging with those in an organization	3.90

Administration

First	Widely known for effective communication within an organization	4.30
Second	Known for accomplishing what is promised. A person of integrity	4.30
Third	Ability to innovate and take occasional risks for the sake of progress	4.20
Fourth	Outgoing and personally engaging with those in an organization	4.10

Staff

First	Widely known for effective communication within an organization	4.40
Second	Known for accomplishing what is promised. A person of integrity	4.20
Third	Widely known for effective communication in the larger community	4.10
Fourth	Outgoing and personally engaging with those in an organization	3.40

Donors

First	Widely known for effective communication within an organization	4.90
Second	Known for accomplishing what is promised. A person of integrity	4.60
Third	Widely known for effective communication in the larger community	4.30
Fourth	Outgoing and personally engaging with those in an organization	4.10