

Resources for OD Consultants

Building Commitment for **Intentional Change**

*Compiled and edited
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The websites in this resource list are separated into two categories:

- Assessment Tools That Can Be Obtained At No Cost
- Assessment Tools That Can Be Purchased

The descriptions come from the websites themselves. Their inclusion doesn't constitute a review or endorsement.

This list will be updated in the future. If you have any other favorite assessment tools that you'd like to see included in the next round, please contact duane@CommunityAtWork.com

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Resources for OD Consultants *Building Commitment for Intentional Change*

ASSESSMENT TOOLS THAT CAN BE OBTAINED AT NO COST

The Organizational Effectiveness Survey Centerpoint for Leaders

The Survey was developed based on the areas and indicators of organizational effectiveness identified in the report, “Profiles in Organizational Effectiveness for Nonprofits,” by Jeanine Lee of the Ewing Marion Kauffman Foundation.
http://www.centerpointforleaders.org/toolkit_org_survey_home.html

Enhancing Organizational Performance: A Toolbox for Self-assessment International Development Research Centre (IDRC)

A 144 page guidebook that presents an innovative and thoroughly tested model for organizational self-assessment. Integrates techniques of formative assessment, in which the assessment team becomes involved in helping its organization become more effective in meeting its goals.
<http://tinyurl.com/IDRC-Toolbox>

Organisational Diagnosis Questionnaire (ODQ) The Ghana Research and Advocacy Programme

The Organizational Diagnosis Questionnaire (ODQ) is based on Weisbord’s practitioner-oriented theory. The ODQ generates data in each of Weisbord’s suggested six areas as well as in a seventh, attitude toward change.
<http://tinyurl.com/6Box-Diagnostic-Survey>

The McKinsey Capacity Assessment Grid
Venture Philanthropy Partners

The McKinsey Capacity Assessment Grid is a tool designed to help nonprofit organizations assess their organizational capacity.
http://www.vpppartners.org/sites/default/files/reports/full_rpt.pdf

For-Profit Organizational Assessment
Authenticity Consulting, Inc.

This assessment tool can be used to get a reasonable impression of the quality of the most important practices in your for-profit business.
<http://www.surveymonkey.com/s.asp?u=88982454855/>

Organization Assessment Tool
Environmental Education and Training Partnership

The “Organization Assessment Tool” (OAT) is a self-assessment tool written to be used by the leaders of Environmental Education organizations to increase the effectiveness of their organizations, but is valuable for others, as well.
<http://tinyurl.com/EETAP-Assessment>

Good to Great Diagnostic Tool
Jim Collins

A set of structured questions to help a group or organization assess how well they are implementing the principles that make great companies. Discuss and determine where you are on your journey from Good to Great.
<http://www.jimcollins.com/tools/diagnostic-tool.pdf>

Management Survey
Learning Center

This assessment is designed to give a snapshot of key factors impacting organizational performance and quality of your work life.
<http://www.learningcenter.net/library/management.shtml>

Organizational Behavior Survey
Lawson & Associates Business Consultants

This questionnaire is to help you assess what behavioral model your organization operates. It is based upon the theory that organizations generally operate out of one of four modes - Autocratic, Custodial, Supportive, or Collegial.
<http://www.gwlawson.com/survey.htm>

Building Future Leaders Diagnostic Survey
The BridgeSpan Group

In this survey, you will be presented with 31 statements that relate to five core processes of leadership development and succession planning.

<http://www.bridgestar.org/Library/LeadershipDiagnostic.aspx>

Organizational Self-Assessment Tool
Massachusetts Cultural Council

For larger organizations, regular distribution of this evaluation to key staff, board and volunteers is a springboard for internal communication, about problem areas or identify places where you're doing a good job.

http://www.massculturalcouncil.org/services/org_assessment.pdf

Nonprofit Organizational Assessment Tool
Center for Community and Economic Development, University of Wisconsin

This 9-part Nonprofit Organizational Assessment Tool can help guide a group discussion about an organization's operations. This group discussion ideally should include board members, staff, volunteers, and service recipients, but could be used as a self-assessment tool by anyone associated with a nonprofit organization.

<http://www.uwex.edu/ces/cced/nonprofits/management/assessment.cfm>

Organizational Capacity Assessment Tool
Marguerite Casey Foundation

The Marguerite Casey Foundation Organizational Capacity Assessment Tool is a self-assessment instrument that helps nonprofits identify capacity strengths and challenges and establish capacity building goals. It is primarily a diagnostic and learning tool.

<http://caseygrants.org/resources/org-capacity-assessment/>

Causal Loop Diagrams
Pegasus Communications

Causal loop diagrams provide a language for articulating our understanding of the dynamic, interconnected nature of our world. We can think of them as sentences which are constructed by linking together key variables and indicating the causal relationships between them. By stringing together several loops, we can create a coherent story about a particular problem or issue.

<http://www.thesystemsthinker.com/tstgdlines.html>

Exploring Problems
SAS2 Dialogue Inc.

The Exploring Problems module includes tools to describe or tell the story about a core problem, and tools to assess the root of a problem. You can download the entire Exploring Problems module for personal use. (in English, French or Spanish.)
<http://www.sas2.net/content/exploring-problems/>

SWOT Analysis
Mind Tools

SWOT Analysis is a useful technique for understanding your Strengths and Weaknesses, and for identifying both the Opportunities open to you and the Threats you face.
http://www.mindtools.com/pages/article/newTMC_05.htm#business/

Participatory Organizational Evaluation Tool (POET)
Civil Society Organisations and Participation Programme, United Nations

Measures and profiles organizational capacities and consensus levels in seven critical areas, and assess, over time, the impact of these activities on organizational capacity (benchmarking). As the name implies, a very participatory approach.
<http://reflectlearn.org/all/undp-participatory-organizational-evaluation-tool-poet>

Most Significant Change method
Clear Horizon

The Most Significant Change (MSC) is a method of participatory evaluation that involves the collection of significant change stories at different levels of the intervention (for example program staff, change agents, intervention participants) and collectively deciding on the most significant change stories based on selected themes.
<http://www.clearhorizon.com.au/our-company/flagship-techniques/most-significant-change>

ASSESSMENT TOOLS THAT CAN BE PURCHASED

The Forrester/Drexler Team Performance™ Indicator **The Grove Consultants International**

Team Performance™ Indicator (TPI) consists of twenty-one items that define critical aspects of team performance. The individual results will allow you to gain new insights into each member's perception of the team purpose and functionality.

http://store.grove.com/product_details.html?productid=77

KEYS® to Creativity and Innovation **Center for Creative Leadership**

KEYS is an organizational survey that assesses the climate for creativity and innovation that exists in a work group, division or organization. It measures specific management practices that impact the work environment.

<http://www.ccl.org/leadership/assessments/KEYSOVerview.aspx>

The Board Excellence Assessment™ and Leadership Excellence Assessment™ **Center for Board Excellence**

The CBE leadership or board evaluation begins with an online survey questionnaire designed to quantitatively and qualitatively measure your board's leadership performance. This Assessment will help your board members determine how well the board is meeting their governance priorities and challenges.

<http://boardevaluations.com/>

Board Self-Assessment: Assess to Advance **BoardSource**

BoardSource assessments focus on how well the board and the chief executive are meeting their responsibilities. Composed of nine sections, including five for all types of nonprofit organizations and four sections for private foundations (foundation strategy, communications and accountability, board composition, and grantmaking oversight).

<http://www.boardsource.org/assessments/home.asp>

Board Self-Assessment **Association of Small Foundations**

ASF's new board self-assessment primer, survey questionnaire, and analysis tools offer a straightforward process for your foundation board. This practical tool is the only board self-assessment designed for all types of grantmaking foundations with few or no staff.

<http://www.smallfoundations.org/tools-resources/board-self-assessment/>

The Core Values Index
Taylor Protocols

An assessment tool that attempts to describe the innate, unchanging nature of an individual. The instrument takes ten minutes or less to complete, and provides a picture of the core motivational drivers of a person.

<http://www.taylorprotocols.com/CVI.php>

Thomas-Kilmann Conflict Mode Instrument
Kilman Diagnostics

The Thomas-Kilmann Instrument is designed to measure a person's behavior in conflict situations. "Conflict situations" are those in which the concerns of two people appear to be incompatible.

<http://www.kilmanndiagnostics.com/catalog/thomas-kilmann-conflict-mode-instrument>

Style Matters: The Kraybill Conflict Style Inventory
Riverhouse Press

Style Matters works with five basic styles of responding to conflict, mapping them as the interplay of task vs. relationship (or assertiveness vs. cooperativeness).

<http://www.riverhousepress.com/stylematters>

Meyers-Briggs Personality Inventory
The Meyers and Briggs Foundation; Instrument distributed by, CPP, Inc.

The purpose of the Myers-Briggs Type Indicator® personality inventory is to make the theory of psychological types described by C. G. Jung understandable and useful in people's lives. The essence of the theory is that much seemingly random variation in the behavior is actually quite orderly and consistent, being due to basic differences in the ways individuals prefer to use their perception and judgment.

<https://www.cpp.com/products/mbti/index.aspx>

FIRO-B
The Human Element; Instrument distributed by, CPP, Inc.

William Schutz originally devised FIRO theory to measure and predict the interaction between people for the purpose of assembling highly productive teams.

<https://www.cpp.com/products/firo-b/index.aspx>