



Sample Non-profit

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ENTERPRISE EDITION

BOARD REPORT

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Results and Key Findings Report Overview

Objectives

1. Identify business performance issues that impede strategy.
2. Gain senior management agreement regarding High-Impact/Low-Performance areas.
3. Prioritize performance improvement goals.
4. Determine action items, due dates, and metrics.
5. Allocate necessary resources.
6. Communicate performance improvement plan.
7. Execute plan.

Highlighted Elements Represent Areas Covered in the Board Assessment

Organization Dynamic Model™ - Board Categories (Non-profit)

1.0 Organization Strategy		2.0 Organization Design		3.0 Organization Culture	
1.1 Mission, Vision, & Distinct Advantage	1.1.1 Mission	2.1 Structure	2.1.1 Structure Alignment	3.1 Values & Beliefs	3.1.1 Values Credibility
	1.1.2 Vision				
	1.1.3 Distinct Advantage				
1.2 External Assessment	1.2.1 Customer/Client Profile	2.2 Core Competence	2.2.1 Leveraging Core Competence	3.2 Leadership	3.2.1 Management Modeling
	1.2.2 Sector & Competitive Analysis				
1.3 Internal Capabilities	1.3.1 Finance	2.3 Information, Systems, & Technology	2.3.1 Organization Communication	3.3 Human Resource Systems	3.3.1 Recruitment
	1.3.2 Developing Programs/Services				
	1.3.3 Delivering Programs/Services				
	1.3.4 Community Awareness				
	1.3.5 Fundraising/Business Development				
	1.3.6 Customer/Client Service				
1.4 Planning & Execution	1.4.1 Planning	2.4 Organization Efficiency	2.4.1 Policies & Procedures	3.4 Organization Character	3.4.1 Informal Communication
	1.4.2 Resource Alignment				
	1.4.3 Execution				
			2.4.2 Roles & Responsibilities		3.4.2 Employee Feedback
			2.4.3 Outsourcing & Partners		3.4.3 Ability to Change

Methodology

The assessment employs a six-point interval scale to evaluate your organization's performance measured against 55 best-practice statements. Each statement requires a response ranging from "Strongly Disagree" to "Strongly Agree". Participants may also choose a "Don't Know" or "Not Applicable" response. Responses from all participants are aggregated resulting in performance mean scores.

The Results & Key Findings report is designed to reflect:

1. **Priorities:** The areas the senior team views to have the most impact on business performance.
2. **Performance:** The team's perception of the organization's current performance in the categories of Strategy, Design, and Culture.
3. **Comparison:** How the organization compares to other organizations in the QuadRed database.
4. **Consensus:** The level of agreement or disagreement that exists among the senior team regarding performance in key areas.

How to Use this Report

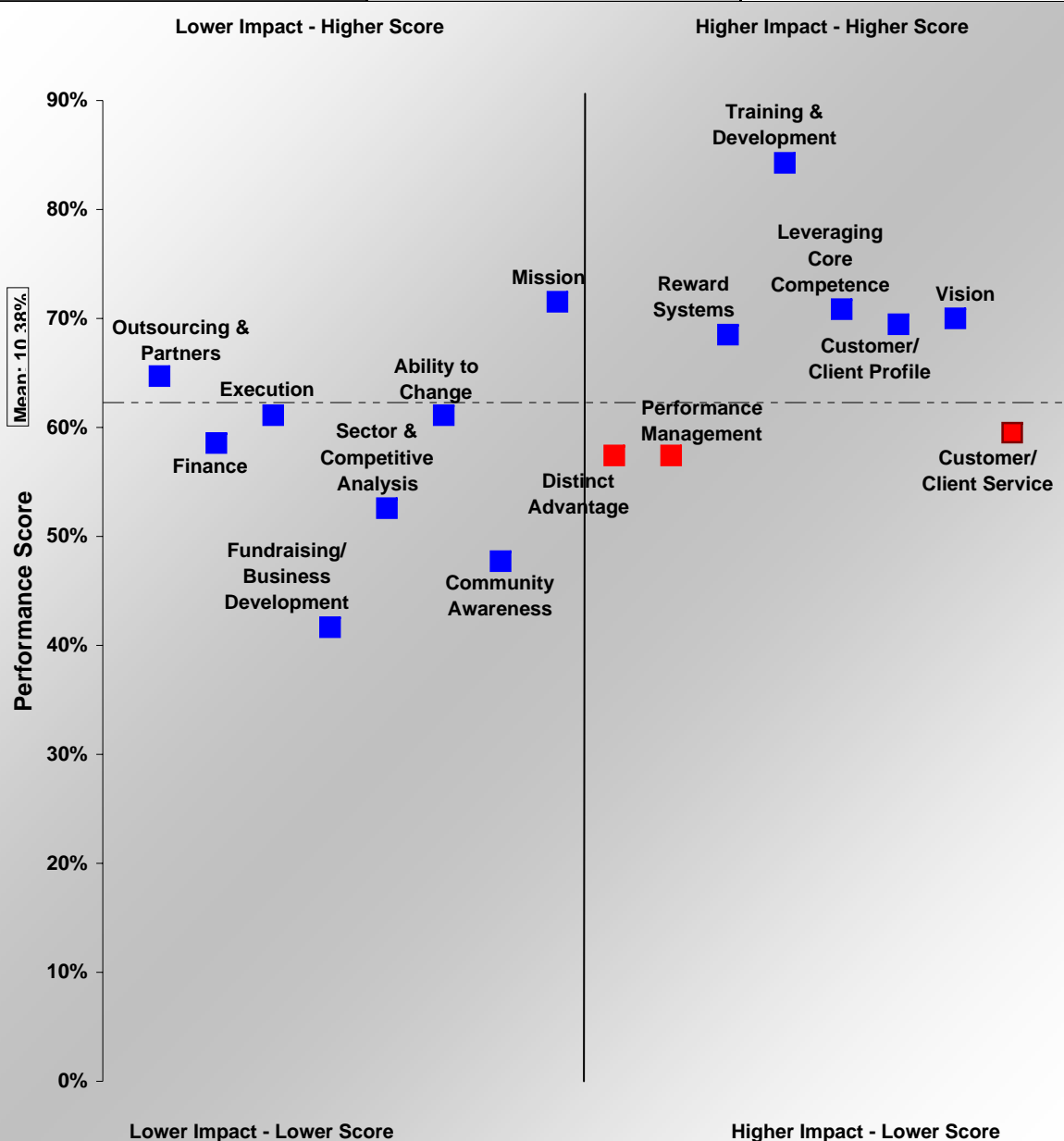
1. Review the Executive Summary and Degree of Impact Summary pages to understand:
 - How the senior team prioritized each of the business areas.
 - How they rated their respective performance.
2. Review the comparison charts to get a sense of where this organization's performance lies in relation to other organizations.
3. Use the Detail Results to see how participants individually rated performance of the high-impact areas. Is there consensus or polarity?
4. Use this information to prioritize key performance improvement goals and to develop and execute an action plan.
5. Take the assessment again in approximately 6 to 12 months to compare results in targeted improvement areas.

Notice: This report reflects the views and opinions of the individuals that have completed the QuadStrat® assessment. The information contained within this report does not imply, direct, or recommend specific actions to be taken on the part of the assessment respondents or the company or firm they represent. It is recommended that you utilize the skills of a certified consultant to facilitate the process.

EXECUTIVE SUMMARY

Degree of Impact

This report plots the Principal Elements of the Organization. The vertical axis represents the performance mean score and the horizontal axis represents the order of priority, with the highest priority to the right. The Priorities table reflects the Principal Elements in order of weighted priority, as determined by the group, and indicates the performance mean score.

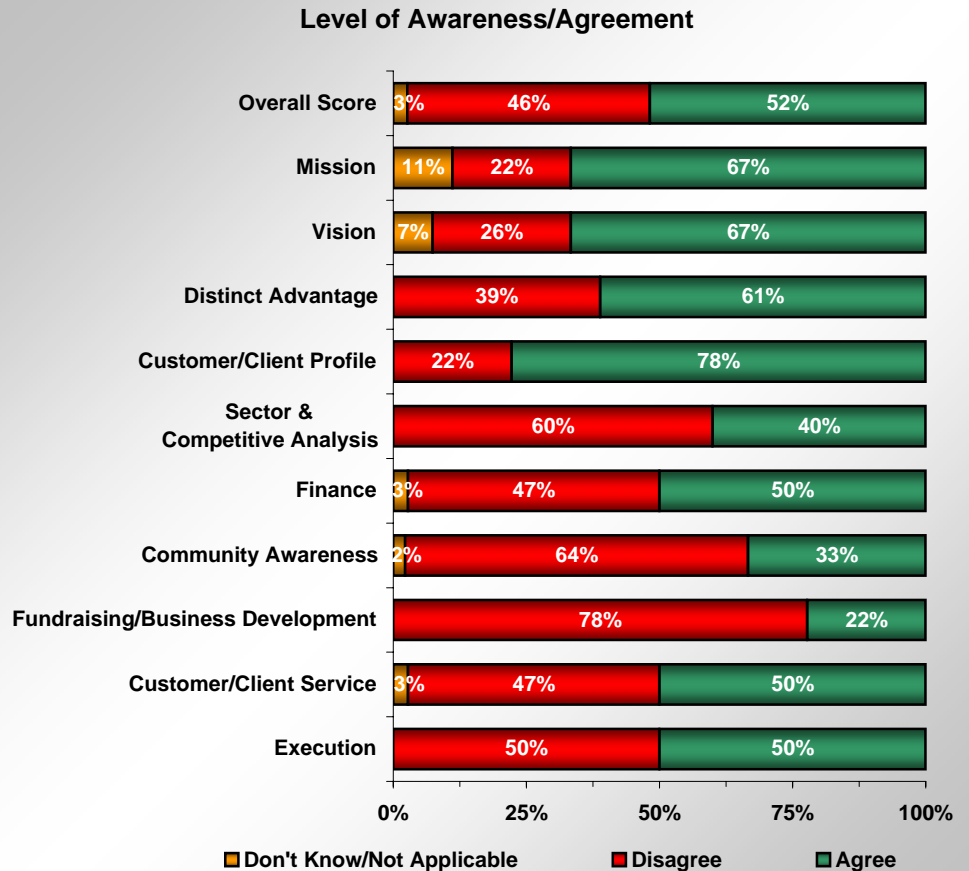
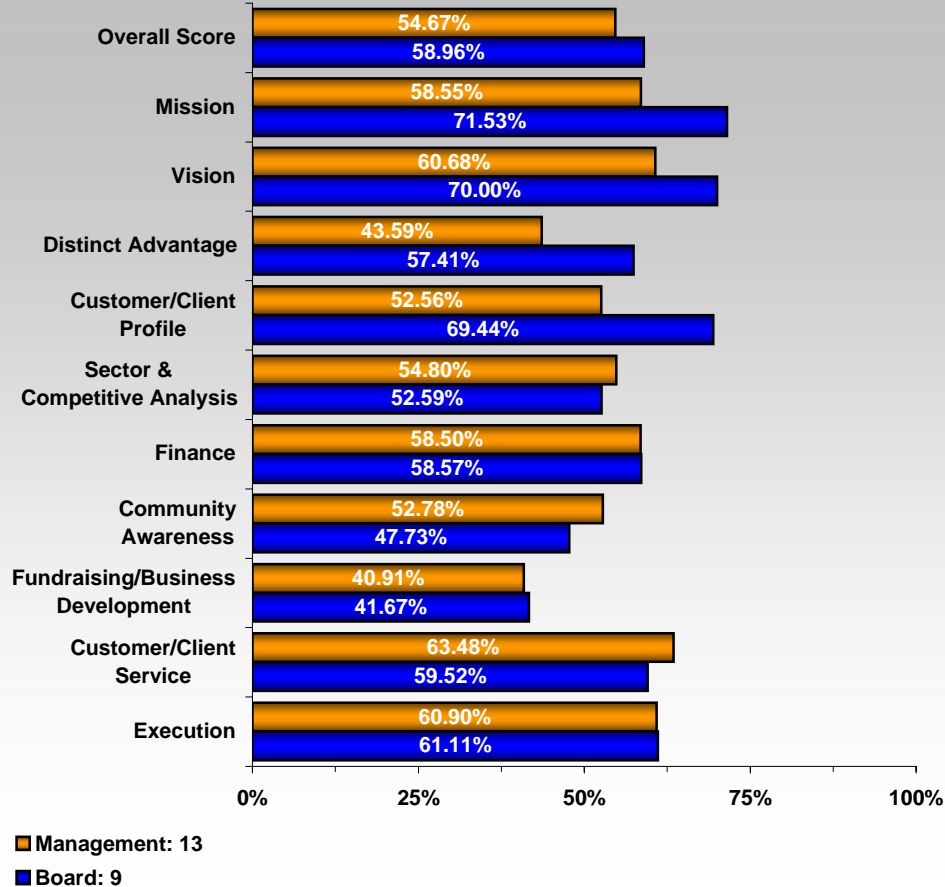


#	Priorities	Impact	Perf.
1	Customer/Client Service	High	59.52%
2	Vision	High	70.00%
3	Customer/Client Profile	High	69.44%
4	Leveraging Core Competence	High	70.83%
5	Training & Development	Med	84.26%
6	Reward Systems	Med	68.52%
7	Performance Management	Med	57.41%
8	Distinct Advantage	Med	57.41%
9	Mission	Med	71.53%
10	Community Awareness	Med	47.73%
11	Ability to Change	Med	61.11%
12	Sector & Competitive Analysis	Low	52.59%
13	Fundraising/Business Development	Low	41.67%
14	Execution	Low	61.11%
15	Finance	Low	58.57%
16	Outsourcing & Partners	Low	64.71%

Organization Strategy

Management Team and Board Comparison

This section of the report compares the management team perceptions with those of the Board of Directors for **Mission, Vision, & Distinct Advantage, External Assessment, Internal Capabilities and Planning & Execution.**



Note: Due to rounding, the total may not exactly equal 100%

Mission, Vision, & Distinct Advantage

Mission		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
1. Our mission statement clearly explains the purpose of our non-profit organization.	Management	0%	0%	15%	23%	31%	23%	8%	31%	64.10%	20.24	Management	58.55%	20.19
	Board	11%	0%	0%	11%	11%	44%	22%	67%	81.25%	16.52	Board	71.53%	21.69
2. Our mission statement explains how those we serve and other stakeholders benefit from our organization.	Management	0%	8%	15%	23%	31%	23%	0%	23%	57.69%	21.10			
	Board	11%	0%	11%	11%	33%	11%	22%	33%	70.83%	23.15			

Organization Strategy		Management Team and Board Comparison		This section of the report compares the management team perceptions with those of the Board of Directors for Mission, Vision, & Distinct Advantage, External Assessment, Internal Capabilities and Planning & Execution.										
Mission (cont.)		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.		Mean Score	Std. Dev.
		DK	1	2	3	4	5	6						
3. Our mission statement clearly explains how our organization is different from other similar organizations.	Management	0%	8%	15%	38%	23%	15%	0%	15%	53.85%	19.43	Management	58.55%	20.19
	Board	11%	0%	22%	11%	33%	11%	11%	22%	62.50%	23.15	Board	71.53%	21.69
Vision		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.		Mean Score	Std. Dev.
		DK	1	2	3	4	5	6						
4. Our vision statement clearly explains what our organization will be doing in the future.	Management	0%	8%	15%	23%	54%	0%	0%	0%	53.85%	16.88	Management	60.68%	20.76
	Board	22%	0%	11%	22%	22%	22%	0%	22%	61.90%	18.54	Board	70.00%	20.41
5. Our vision serves the long-term interest of our customers and other stakeholders.	Management	0%	0%	23%	8%	31%	31%	8%	38%	65.38%	22.01			
	Board	0%	0%	11%	0%	22%	44%	22%	67%	77.78%	20.41			
6. Our vision gives us the direction we need to make good decisions.	Management	0%	8%	8%	23%	31%	23%	8%	31%	62.82%	22.72			
	Board	0%	0%	11%	22%	22%	33%	11%	44%	68.52%	21.15			
Distinct Advantage		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.		Mean Score	Std. Dev.
		DK	1	2	3	4	5	6						
7. We have effectively established a distinctive or unique advantage within the non-profit industry.	Management	0%	15%	15%	54%	15%	0%	0%	0%	44.87%	15.79	Management	43.59%	16.38
	Board	0%	0%	33%	0%	33%	22%	11%	33%	62.96%	24.69	Board	57.41%	21.56
8. Our organization's unique advantage is clearly understood by all staff.	Management	0%	15%	38%	23%	23%	0%	0%	0%	42.31%	17.50			
	Board	0%	0%	44%	0%	56%	0%	0%	0%	51.85%	17.57			
External Assessment														
Customer/Client Profile		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.		Mean Score	Std. Dev.
		DK	1	2	3	4	5	6						
9. Our organization has clearly identified the specific features and benefits our customers/clients seek.	Management	0%	8%	8%	46%	15%	23%	0%	23%	56.41%	19.88	Management	52.56%	19.83
	Board	0%	0%	0%	22%	33%	33%	11%	44%	72.22%	16.67	Board	69.44%	17.39
10. Our organization has clearly identified why our customers or clients would NOT utilize our programs and services.	Management	0%	15%	15%	38%	23%	8%	0%	8%	48.72%	19.79			
	Board	0%	0%	11%	11%	56%	11%	11%	22%	66.67%	18.63			
Sector & Comparative Analysis		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.		Mean Score	Std. Dev.
		DK	1	2	3	4	5	6						
11. Our organization has clearly identified the key strengths and weaknesses of organizations offering similar programs or services.	Management	8%	23%	23%	31%	8%	8%	0%	8%	41.67%	20.72	Management	54.80%	19.59
	Board	0%	0%	22%	33%	22%	22%	0%	22%	57.41%	18.84	Board	52.59%	23.29
12. Our organization has thoroughly assessed the threat of substitute organizations or programs.	Management	8%	8%	23%	38%	23%	0%	0%	0%	47.22%	15.63			
	Board	0%	11%	33%	33%	11%	0%	11%	11%	48.15%	24.22			

Organization Strategy

Management Team and Board Comparison

This section of the report compares the management team perceptions with those of the Board of Directors for **Mission, Vision, & Competitive Advantage, External Assessment, Internal Capabilities and Planning & Execution.**

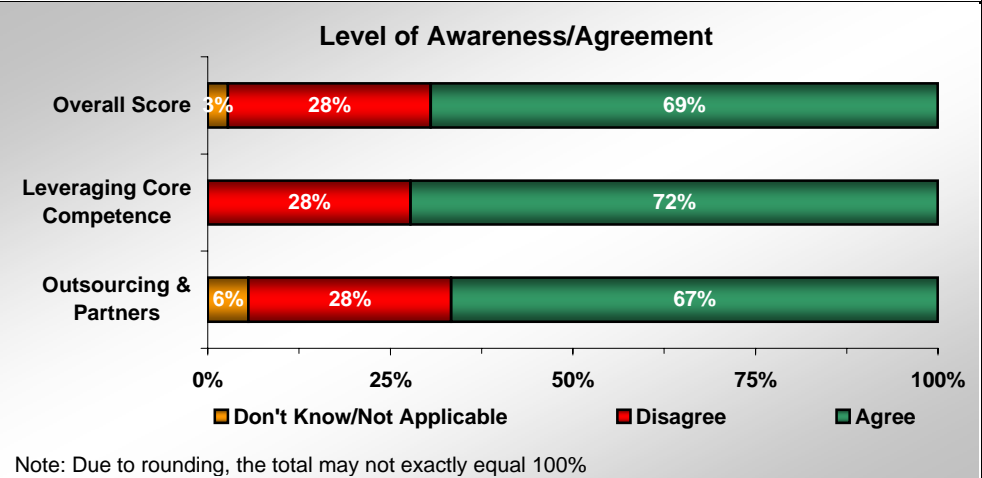
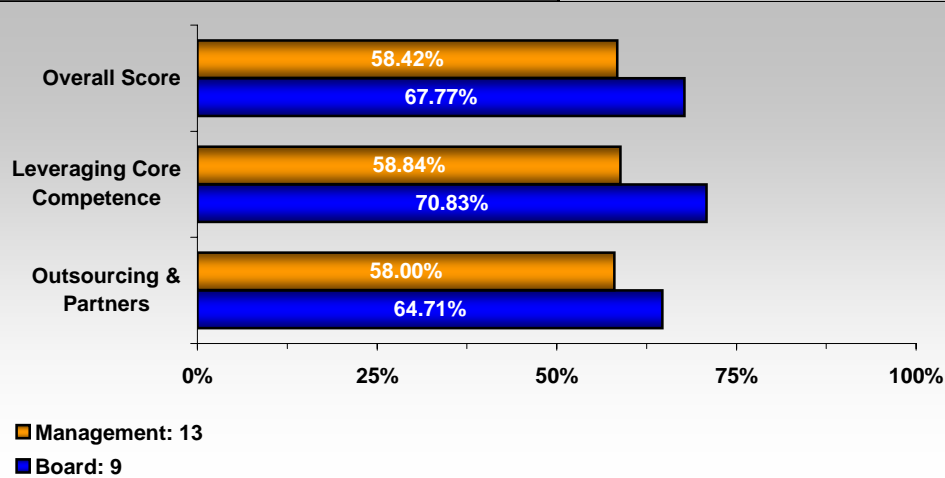
Sector & Comparative Analysis (cont.)		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.			
		DK	1	2	3	4	5	6								
13. We have analyzed the outlook for growth in the non-profit sectors we serve.	Management	8%	8%	0%	23%	46%	15%	0%	15%	61.11%	17.88	Management	54.80%	19.59		
	Board	0%	0%	22%	22%	33%	11%	11%	22%	61.11%	22.05	Board	52.59%	23.29		
14. Our organization's customer base and communities served are growing at a rate that meets or exceeds the growth of similar organizations.	Management	15%	0%	8%	15%	38%	23%	0%	23%	65.15%	15.73	DK = Don't Know/Not Applicable 1 = Strongly Disagree 2 = Disagree 3 = Somewhat Disagree 4 = Somewhat Agree 5 = Agree 6 = Strongly Agree				
	Board	0%	22%	22%	11%	33%	11%	0%	11%	48.15%	24.22					
15. Our organization has analyzed threats and opportunities that could result from broad trends or changes in local, national, and world economies.	Management	8%	0%	23%	15%	31%	23%	0%	23%	59.72%	19.41					
	Board	0%	33%	0%	33%	22%	0%	11%	11%	48.15%	28.19					
Internal Capabilities																
Finance		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.				Mean Score	Std. Dev.
		DK	1	2	3	4	5	6								
16. Our organization has allocated the financial resources necessary to achieve our mission.	Management	8%	0%	0%	23%	15%	38%	15%	54%	75.00%	18.12	Management	58.50%	21.82		
	Board	0%	0%	0%	0%	33%	11%	56%	67%	87.04%	16.20	Board	58.57%	24.04		
17. Our organization has consistently performed within a targeted range of financial goals.	Management	0%	8%	23%	46%	8%	15%	0%	15%	50.00%	19.24					
	Board	0%	0%	11%	33%	56%	0%	0%	0%	57.41%	12.11					
18. Our organization utilizes a "Cost/Benefit" approach when allocating resources for new programs or services.	Management	0%	0%	23%	38%	15%	15%	8%	23%	57.69%	21.10					
	Board	0%	22%	33%	11%	22%	11%	0%	11%	44.44%	23.57					
19. Our organization utilizes an "If/Then" scenario-building exercise when formulating our strategic plan.	Management	15%	8%	15%	38%	15%	0%	8%	8%	51.52%	21.67					
	Board	11%	0%	44%	33%	11%	0%	0%	0%	43.75%	12.40					
Community Awareness		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.			
		DK	1	2	3	4	5	6								
20. Our organization has a clearly defined plan for creating greater community awareness.	Management	15%	8%	8%	23%	38%	8%	0%	8%	56.06%	18.67	Management	52.78%	19.85		
	Board	0%	0%	22%	44%	11%	22%	0%	22%	55.56%	18.63	Board	47.73%	25.05		
21. As part of our plan to promote community awareness for our organization we reinforce our distinct identity.	Management	15%	8%	0%	31%	23%	23%	0%	23%	60.61%	20.10					
	Board	0%	0%	22%	22%	33%	22%	0%	22%	59.26%	18.84					
22. Our organization utilizes a comprehensive customer database that provides management with detailed individual and community information.	Management	31%	15%	8%	15%	31%	0%	0%	0%	48.15%	21.16					
	Board	11%	44%	22%	0%	11%	0%	11%	11%	37.50%	30.54					
23. Our unique benefits are emphasized in all our efforts to build community awareness.	Management	31%	0%	23%	15%	23%	8%	0%	8%	53.70%	18.22					
	Board	0%	11%	22%	22%	11%	33%	0%	33%	55.56%	25.00					
24. Our organization consistently analyzes the "Return-on-Investment" (ROI) of our community awareness campaigns.	Management	38%	15%	15%	15%	15%	0%	0%	0%	41.67%	19.92					
	Board	0%	56%	33%	0%	0%	11%	0%	11%	29.63%	21.69					

Organization Strategy		Management Team and Board Comparison							This section of the report compares the management team perceptions with those of the Board of Directors for Mission, Vision, & Distinct Advantage, External Assessment, Internal Capabilities and Planning & Execution.					
Fundraising/Business Development		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
25. Our staff members who are responsible for fundraising consistently achieve their goals.	Management	15%	23%	15%	38%	8%	0%	0%	0%	39.39%	17.11	Management	40.91%	16.85
	Board	0%	11%	44%	22%	22%	0%	0%	0%	42.59%	16.90	Board	41.67%	16.42
26. Our customer fundraising and business development teams employs a well-defined management process.	Management	15%	15%	23%	31%	15%	0%	0%	0%	42.42%	17.26			
	Board	0%	11%	56%	11%	22%	0%	0%	0%	40.74%	16.90			
Customer/Client Service		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
27. Our service standards are clearly defined and documented.	Management	15%	0%	8%	23%	46%	8%	0%	8%	60.61%	13.49	Management	63.48%	15.40
	Board	0%	0%	11%	44%	33%	0%	11%	11%	59.26%	18.84	Board	59.52%	20.33
28. We consistently exceed our customer's expectations.	Management	8%	0%	8%	15%	46%	23%	0%	23%	65.28%	15.01	DK = Don't Know/Not Applicable 1 = Strongly Disagree 2 = Disagree 3 = Somewhat Disagree 4 = Somewhat Agree 5 = Agree 6 = Strongly Agree		
	Board	0%	0%	11%	11%	56%	11%	11%	22%	66.67%	18.63			
29. Our organization regularly obtains and evaluates customer/constituent feedback.	Management	8%	0%	23%	15%	54%	0%	0%	0%	55.56%	14.80			
	Board	0%	11%	33%	56%	0%	0%	0%	0%	40.74%	12.11			
30. Our organization enjoys a higher rate of returning customers and donor satisfaction than similar organizations or agencies.	Management	8%	0%	0%	15%	38%	31%	8%	38%	72.22%	14.79			
	Board	11%	0%	11%	0%	22%	56%	0%	56%	72.92%	17.68			
Planning & Execution														
Execution		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
31. We execute our strategic goals.	Management	0%	0%	15%	46%	31%	8%	0%	8%	55.13%	14.25	Management	60.90%	16.29
	Board	0%	0%	33%	33%	11%	22%	0%	22%	53.70%	20.03	Board	61.11%	19.80
32. Our senior managers routinely review the status of our strategic goals and objectives.	Management	0%	0%	8%	23%	31%	38%	0%	38%	66.67%	16.67			
	Board	0%	0%	0%	33%	33%	22%	11%	33%	68.52%	17.57			

Organization Design

Management Team and Board Comparison

This section of the report compares the management team perceptions with those of the Board of Directors for **Core Competence and Organization Efficiency**.



Core Competence

Leveraging Core Competence		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
33. Our organization has clearly identified and articulated our core competencies.	Management	0%	0%	23%	15%	38%	23%	0%	23%	60.26%	18.68	Management	58.84%	16.70
	Board	0%	0%	0%	22%	22%	33%	22%	56%	75.93%	18.84			
34. We leverage our core competencies to create real value for our customers.	Management	8%	0%	15%	31%	31%	15%	0%	15%	58.33%	16.67	DK = Don't Know/Not Applicable 1 = Strongly Disagree 2 = Disagree 3 = Somewhat Disagree 4 = Somewhat Agree 5 = Agree 6 = Strongly Agree		
	Board	0%	0%	0%	11%	22%	56%	11%	67%	77.78%	14.43			
35. We leverages our core competencies to distinguish ourselves from similar organizations.	Management	8%	0%	15%	31%	31%	15%	0%	15%	58.33%	16.67			
	Board	0%	0%	0%	33%	33%	22%	11%	33%	68.52%	17.57			
36. We leverage our core competencies in order to seize new programs or service opportunities.	Management	8%	0%	15%	31%	31%	15%	0%	15%	58.33%	16.67			
	Board	0%	0%	11%	33%	33%	22%	0%	22%	61.11%	16.67			

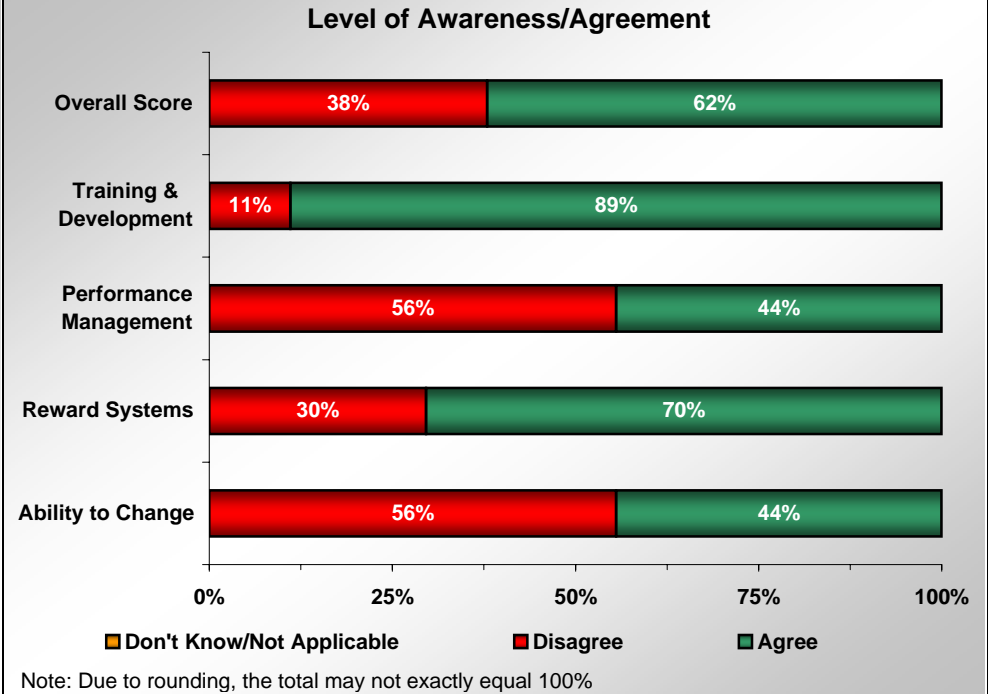
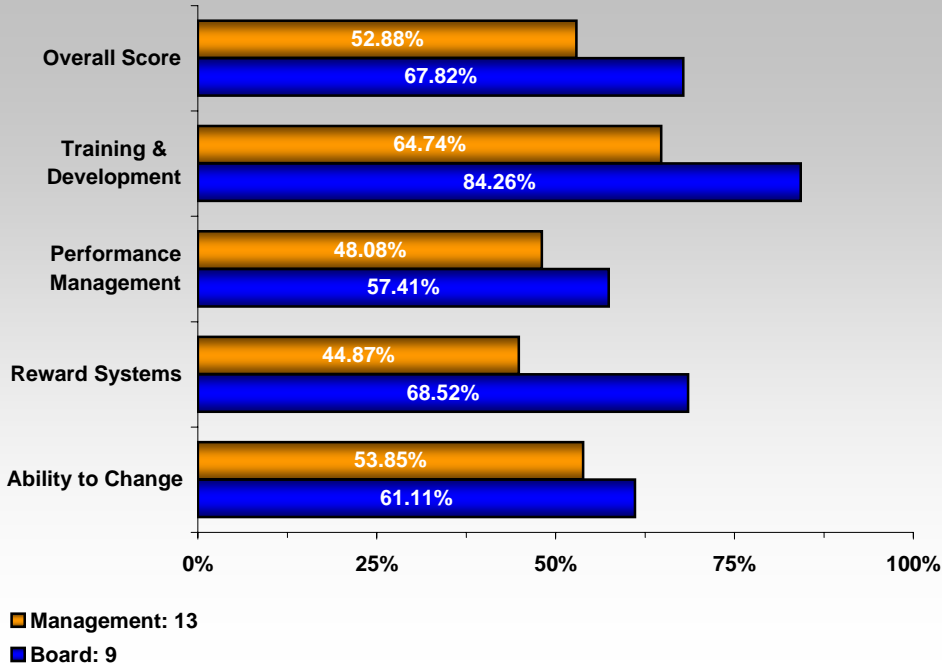
Organization Efficiency

Outsourcing & Partners		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
37. Our organization outsources processes and functions that do not relate to our corporate core competencies.	Management	8%	8%	8%	23%	31%	23%	0%	23%	59.72%	20.67	Management	58.00%	18.71
	Board	11%	11%	11%	0%	11%	44%	11%	56%	68.75%	28.78			
38. Our organization monitors the performance of our vendors and strategic partners.	Management	0%	0%	23%	31%	31%	15%	0%	15%	56.41%	17.40			
	Board	0%	11%	11%	11%	33%	33%	0%	33%	61.11%	23.57			

Organization Culture

Management Team and Board Comparison

This section of the report compares the management team perceptions with those of the Board of Directors for **Human Resource Systems and Organization Character**.



Human Resource Systems

Training & Development		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
39. Our organization invests in training.	Management	0%	0%	8%	23%	31%	15%	23%	38%	70.51%	21.68	Management	64.74%	23.25
	Board	0%	0%	0%	0%	0%	44%	56%	100%	92.59%	8.79	Board	84.26%	16.64
40. Our training programs improve our organization's performance.	Management	0%	15%	0%	31%	31%	15%	8%	23%	58.97%	24.17			
	Board	0%	0%	0%	22%	22%	33%	22%	56%	75.93%	18.84			
Performance Management		FREQUENCY OF RESPONSE							Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
		DK	1	2	3	4	5	6						
41. Our organization uses a results-oriented staff performance review process.	Management	0%	8%	15%	23%	38%	8%	8%	15%	57.69%	22.17	Management	48.08%	24.19
	Board	0%	11%	22%	22%	11%	22%	11%	33%	57.41%	27.78	Board	57.41%	25.06
42. At our organization people are held accountable for their work.	Management	0%	46%	8%	15%	31%	0%	0%	0%	38.46%	22.96			
	Board	0%	0%	33%	22%	22%	11%	11%	22%	57.41%	23.73			

Organization Culture		Management Team and Board Comparison		This section of the report compares the management team perceptions with those of the Board of Directors for Human Resource Systems and Organization Character .													
				FREQUENCY OF RESPONSE								Pos. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.	
Reward Systems		DK	1	2	3	4	5	6	Pos. Score	Mean Score	Std. Dev.	Management	Mean Score	Std. Dev.			
43. Given our goals, we are rewarding the appropriate skills and behaviors.	Management	0%	15%	31%	15%	31%	8%	0%	8%	47.44%	21.35	Management	44.87%	23.93			
	Board	0%	0%	33%	0%	33%	11%	22%	33%	64.81%	26.93	Board	68.52%	23.27			
44. Our organization rewards employees fairly.	Management	0%	31%	15%	23%	23%	0%	8%	8%	44.87%	25.81	DK = Don't Know/Not Applicable 1 = Strongly Disagree 2 = Disagree 3 = Somewhat Disagree 4 = Somewhat Agree 5 = Agree 6 = Strongly Agree					
	Board	0%	0%	0%	11%	33%	33%	22%	56%	77.78%	16.67						
45. At our organization, promotions are only given to the people that deserve them.	Management	0%	31%	31%	8%	23%	0%	8%	8%	42.31%	26.01						
	Board	0%	0%	22%	22%	33%	0%	22%	22%	62.96%	24.69						
Organization Character																	
Ability to Change		FREQUENCY OF RESPONSE								Pos. Score	Mean Score				Std. Dev.	Mean Score	Std. Dev.
46. Our organization manages change well.	Management	0%	0%	31%	23%	38%	8%	0%	8%	53.85%	16.88	Management	53.85%	16.88			
	Board	0%	0%	22%	33%	11%	22%	11%	33%	61.11%	23.57	Board	61.11%	23.57			