

Data Intermediary Organizational Rapid Self-Assessment Tool

Data intermediaries can use this tool to take a quick step back from day-to-day work, assess the organization, identify promising practices to celebrate and promote, and identify challenges and sticking points. Consider these basic guiding questions when reviewing your responses in each section:

- What are our strengths in this area?
- What improvements can we make?
- What are our next steps/action items?

Contract and Project Management

- What percent of contracts/grants are fully-executed before starting work?
- What percent of contracts/grants are completed within their budget?
- What percent of projects use project or task management software?
- Are staff are required to track time spent by project or by task (or both)?

Sustainability

- When was the strategic plan for the organization or the data intermediary business unit last revised?
- Is there a defined strategy or methodology for assessing whether to respond to proposals or requests?
- Is there a guideline for limiting spending on proposal development? Is the guidance followed?
- Describe your client mix in the past 12 months.
 - How many new clients?
 - How many returning clients?
- Are cash reserves available to cover 3-6 months of payroll and organizational costs?

Communications

- Is there a plan for communications? When was the plan last updated?
- Are there established targets or metrics for communications? Is there a plan for monitoring them?
- Is there a CRM to manage relationships with stakeholders and funders?

Continuous Improvement

- Are there established performance measures for the organization or NNIP business unit?
- Are there regular discussions with the team about performance measures?
- Do you reach out to past clients to collect information on the impact of your work?

Staffing

- Do staff have support for professional development?
- Does the organization and NNIP unit have guidelines that support staff diversity and inclusion?
- Does the organization and NNIP business unit have guidelines on onboarding and offboarding staff?
- Is staff turnover, by staff level, reviewed annually?
- Does the organization and NNIP unit have a succession plan?

Governance

- Is there an Advisory Board and/or Organizational Board?
- How useful is the Advisory Board for fundraising, networking, outreach, and strategic planning?
- How useful is the Organizational Board for fundraising, networking, outreach, and strategic planning?