

ORGANIZATION EFFECTIVENESS CHECKLIST

Scoring: 1 "not at all"; 5 "completely". Low scores suggest "ineffective" – action needed.
Use a line to connect the box scores. The graph shows areas in need of action.

Low High

		1	2	3	4	5
MISSION, STRATEGY AND VISION	A Mission Statement exists for the organization that is followed in practice.					
	The Mission is published.					
	The Mission was reviewed in the last 3 years.					
	The Mission is clearly communicated to staff, customers, suppliers and other stakeholders.					
	A Vision exists that describes the future for the organization.					
	A strategic plan exists that includes goals and objectives.					
GOALS	The organization sets Goals that support the Mission Statement.					
	The Goals are published.					
	The Goals were reviewed in the last 12 months.					
	The Goals are measured and used in performance evaluations of staff and future plans.					
	There is a clear process used for setting the Goals.					
TASKS, FUNCTIONS	Tasks are clearly defined and assigned, including accountability and authority.					
	Tasks are defined in conjunction with the staff.					
	Task performance is measured.					
	Feedback is provided to staff on positive and negative situations.					
STRUCTURE	Organization structure reflects the complexity of tasks, geography, and skill requirements.					
	There is a defined and accepted accountability hierarchy.					
STAFFING	Staff turnover and absenteeism are less than the industry average.					
	Staff have the necessary tools to ensure their productivity.					
	Staff are encouraged to introduce change to improve performance.					
	"Having fun" at work is an important cultural factor.					
	Staff are properly classified and allocated in adequate numbers to meet standards of service.					
	Safety policies and procedures have been established, written communicated and monitored.					
	Career development is fostered and clearly planned, including succession.					
PROCESSES	Formal planning processes exist.					
	Actual performance measurements are made against plans.					
	Remedial plans are undertaken.					
	The operating groups in the organization are involved in planning and control.					
	Legal and regulatory requirements are regularly updated.					
	An ethical approach is valued as a cultural standard.					
	Budget developed with staff input, reflecting history, needs & prioritized allocation of resources.					
	Communication of plans and actions are clear to staff, customers, stakeholders and others.					
INTEGRATION	There is access to needed information from one structural unit to another.					
	Mechanisms exist to ensure linkage with other similar groups.					
	Conflict between units is resolved productively, in a way that contributes to results.					
CUSTOMERS	Leadership and staff spend time determining customer needs.					
	Customer satisfaction is regularly measured.					
	Changes are made to improve customer satisfaction.					