



Organization Overview

for Client Consultation

CONTACT INFO

Organization Name			
HQ Street Address			
City and State	Zip Code	Country	
Website			
HQ Phone	HQ Fax		
Primary Contact & Title			
Contact Phone	Contact E-mail		

KEY INFO

Program Area			Program Target Population				
CEO Name & Title							
Total Employees (FT & PT)				Total Volunteers			
Board Chairman & Years on Board				Number of Board Committees			
Total Board Members				Number of Board Meetings Per Year			
Annual Budget % Funded by Board				Total Current Debt			
Year Founded				Cash Reserves On Hand			
Number of Donors and Gift Size Last FY	Gift Size:	< \$1000	\$1 - 5,000	\$5 - 25,000	\$25 - 50,000	\$50 - 100,000	\$100,000 +
	# of Donors:						
	Total Amount:						
Organizational Memberships	ECFA (ecfa.org) Charity Navigator (charitynavigator.org) Guidestar (guidestar.org) BBB (give.org) Ministry Watch (ministrywatch.com)		Partner Organizations				
IRS 990 Form Available For Public Inspection				Yes	No	Not required by law to file	

FINANCIAL INFO

		FISCAL YEAR TO	FISCAL YEAR ACTUAL 2007	FISCAL YEAR ACTUAL 2008	FISCAL YEAR ACTUAL 2009	2010 BUDGET
INCOME	Other Revenue					
	Cash					
	<i>Total Income</i>					
EXPENSES	Program Services					
	Administrative					
	Fundraising					
	<i>Total Expense</i>					
SURPLUS/DEFICIT						

THREE-YEAR GROWTH/LOSS TRENDS

	Growth/Loss %	2006	2007	2008	2009	Explanation (optional)
Staff % Change						
Clients Served % Change						
Funding % Change						
Donor % Change						

OUR "ELEVATOR SPEECH" (external)

What do you do?	
Exemplary Project	
Big Organizational Goal	

THE EXPANDED DRUCKER QUESTIONS (internal)

1. What is our mission?	
2. Who is our customer?	
3. What does the primary customer value?	
4. What have been our results? Explain briefly how you track results.	
5. What is our plan for the near future? Provide specific goals for the next 1-5 years.	
* Cite 1 recent & significant program improvement.	

COUNTRIES OF OPERATION

--

S.W.O.T. ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

Completed By:

Date:



Organization Overview

Introduction: Completion of the Organization Overview helps our clients have an up-to-date summary of active organizations serving unique populations around the world. The Organization Overview Database is used in client consultation to identify organizations that fit a client's passion and strategic focus. The satisfactory completion of the Organization Overview does not guarantee its use in client consultation or promise future donations. We do believe the questions asked on the form can help any organization evaluate its current situation and compare it to where the organization wants to be.

The majority of the informational fields in the Organization Overview are self-explanatory but a few may require further instruction, especially on the second page. Below you will find instructions for each question and examples to follow (where applicable).

CONTACT INFO

ORGANIZATION NAME: Write the name of the organization and place in parentheses any alternate names used in other countries (if applicable).

HQ STREET ADDRESS: Physical street address for the organization's headquarters. Place separate mailing address in parentheses (if applicable).

WEBSITE: The web address of the organization's homepage.

HQ PHONE: The phone number for the organization's headquarters.

HQ FAX: The fax number at the organization's headquarters (if applicable).

PRIMARY CONTACT AND TITLE: The person in the organization who is responsible for communicating with and reporting to major donors.

CONTACT PHONE: The phone number where the primary contact can be most easily reached.

CONTACT E-MAIL: The e-mail address where the primary contact can be most easily reached.

KEY INFO

PROGRAM AREA: Choose one or more categories in the drop down menu that identifies the type of program services the organization provides.

PROGRAM TARGET POPULATION: Choose one or more categories in the drop down menu that identifies the type of people the organization serves.

CEO NAME AND TITLE: Name and title of the day to day director of the organization.

TOTAL EMPLOYEES (FT & PT): Record the number of fulltime employees and the number of part time employees (if applicable).

Example: 20 FT and 3 PT

TOTAL VOLUNTEERS: Total number of people who have volunteered with the organization in the past year.

BOARD CHAIRMAN AND YEARS ON BOARD: The name of the current board chairman and the total number of years on the board (at any rank).

NUMBER OF BOARD COMMITTEES: The number of committees that are formed by members of the organization's board.

TOTAL BOARD MEMBERS: The total number of voting members who serve on the organization's board.

NUMBER OF BOARD MEETINGS PER YEAR: The number of times the board meets each year.

ANNUAL BUDGET % FUNDED BY BOARD: Divide the amount of money that board members donated to the organization in the last complete fiscal year by the total expenses for that year. Convert the answer to a percentage and place it in the space provided.

TOTAL CURRENT DEBT: Place the sum total of all loan debt in the space provided. Include credit card debt and all other loans in this calculation.

YEAR FOUNDED: The year in which the organization was founded. If the organization was previously a part of another ministry, please list the year of the former organization's founding in parentheses.

CASH RESERVES ON HAND: Select the best description from the drop-down menu of the cash reserves on hand for your organization.

NUMBER OF DONORS AND GIFT SIZE LAST FY: Record (1) the number of distinct donors in the first row under each gift range and (2) the total amount of dollars raised through gifts given in that gift range during the last complete FY on record.

ORGANIZATIONAL MEMBERSHIPS: Check the applicable boxes for the regulatory groups of which the organization is an active member.

PARTNER ORGANIZATIONS: List other organizations that collaborate in the delivery of the program services in any way, starting with key partners and ending with organizations that represent smaller partners.

IRS 990 FORM AVAILABLE FOR PUBLIC INSPECTION: Is the ministry's 990 form made readily available upon request or online? Check appropriate box.

FINANCIAL INFO

FISCAL YEAR ____ TO ____: The beginning and ending date of the organization's fiscal year should be placed in the red boxes.

Example: 4/1 to 3/29

OTHER REVENUE: Any revenue received by the organization besides cash. This may include gifts in kind, books sales revenue, investment returns, etc.

CASH: Income received in the form of cash from donors and/or grants.

TOTAL INCOME: The total income received in the given fiscal year.

Example: Other Revenue + Cash = Total Income

PROGRAM SERVICES: Expenses related to program services conducted by the organization in the given fiscal year.

ADMINISTRATIVE: Administrative expenses for the given fiscal year.

FUNDRAISING: Expenses related to fundraising for the organization in the given fiscal year.

TOTAL EXPENSES: The total expenses for the organization in the given fiscal year.

Example: Program Services + Administrative + Fundraising = Total Expenses

SURPLUS/DEFICIT: Total Income – Total Expenses = Surplus or Deficit (Place deficit amount in parentheses if applicable)

PREVIOUS THREE YEAR GROWTH/LOSS

STAFF % Change: (2009 numbers- 2006 numbers)/2006 numbers = 3 year staff % change. Record % change and raw data for 2006-2009 in the spaces provided. Differentiate between FT and PT if applicable.

Example: -20% loss from 48FT & 12PT (2006) to 45FT & 5PT (2009)

CLIENTS SERVED % Change: (2009 numbers- 2006 numbers)/2006 numbers = 3 year clients served % change. Record % change and raw data for 2006-2009 in the spaces provided.

Example: 140% growth from 2,000 (2006) to 4,800 (2009)

FUNDING % Change: (2009 numbers- 2006 numbers)/2006 numbers = 3 year funding % change. Record % change and raw data for 2006-2009 in the spaces provided.

Example: -25% loss from 2,500,000 (2006) to 2,000,000 (2009)

DONOR % Change: (2009 numbers- 2006 numbers)/2006 numbers = 3 year donor % change. Record % change and raw data for 2006-2009 in the spaces provided.

Example: -5% loss from 1200 (2006) to 1140 (2009)

OUR "ELEVATOR SPEECH" (external)

Note: These are short answers to questions which help explain the organization to someone who may not be familiar with the organization's work. The 3 questions amount to a 2-minute speech that summarizes the work and vision of the organization.

WHAT DO YOU DO? : This answer summarizes the programs of the organization that create the brand experience for the receptor.

Example: The Teacher Development and School Supply programs recruit teachers to teach in developing nations, organize ongoing teacher development and support, establish after school tutoring and vocational training programs, and provide educational tools such as books, writing utensils, backpacks, computers, and paper for students.

EXEMPLARY PROJECT: Describe one recent project that highlights the proven model and measurable results of the organization.

Example: The 2009 Teacher Development program received government recognition for its proven effectiveness and therefore was able to train twice as many teachers in 6 different locations during the year (412 total teachers) . The program has seen the first class of graduates (who completed all 3 stages of the program in 2007) increase their students' national test scores by an average of 18% the following year.

BIG ORGANIZATIONAL GOAL: This is the ideal result of the organization's work and nearly impossible unless everything works in your favor. It is the accomplishment of everything the organization has set out to do.

Example: Every impoverished child in Central America will have quality educational opportunities in primary and secondary school so that they can work their way out of cyclical poverty.

THE EXPANDED DRUCKER QUESTIONS

Note: These 5 questions were designed by Peter Drucker to make organizations evaluate how well they are fulfilling their mission of serving their customers. Peter Drucker's simple book "The Five Most Important Questions You Will Ever Ask Your Organization" was re-released and updated in 2008 and would be helpful for any organization to use as an evaluative tool. It can force an organization to ask questions and assess itself more honestly than ever before. The following links may be helpful in understanding exactly what the questions below are asking:

- www.echelonmanagement.com/orgsuccess.html
- www.heartlink.org/boardlink/A000000709.cfm

1. WHAT IS OUR MISSION? : What has the organization set out to do? This may be the same or very similar to the organization's mission statement.

Example: To enhance the educational experience of underprivileged children in Central America.

2. WHO IS OUR CUSTOMER? : This represents the primary target person that the organization has set out to serve.

Example: Underprivileged children living in poverty in Central America

3. WHAT DOES THE PRIMARY CUSTOMER VALUE? : This is what the primary customer considers of greatest importance and therefore what the organization uses to direct its programs.

Example: An education that allows them to better their lives and the lives of family members.

4. WHAT HAVE BEEN OUR RESULTS? : Summarize the results the organization has seen up to this point. Focus on clear numbers and dates. Describe how the organization tracks those results, how often, and if a distinction is made between organizational output and long-term transformational outcomes.

Example: Over the past 5 years we have opened 15 schools which can accommodate 200 students each. We have seen 600 students graduate with a high school level diploma while maintaining a graduation rate of 85%. We have recruited 58 teachers, organized 24 teacher training conferences, partnered with 39 public schools, and provided \$3.9 million in school supplies. Student scores on standardized tests at the 9 schools where we have worked for more than 5 years are 64% higher than the national average. Economic statistics show high school graduates are 15 times less likely to live in poverty.

5. WHAT IS OUR PLAN FOR THE NEAR FUTURE? : The direction the organization is heading to continue accomplishing its mission, e.g., is the organization expanding into new countries or new areas, or implementing new strategies?

Example: XYZ Organization is opening an additional 10 schools in the next 2 years along with 7 computer labs to teach students basic computer skills. The teacher mentor program is scheduled to begin August 2010 and 14 more teacher training conferences are planned for the next 16 months.

* **CITE 1 RECENT & SIGNIFICANT PROGRAM IMPROVEMENT:** Has your organization evaluated its programs and made a significant upgrade in the past year?

COUNTRIES OF OPERATION

Please list the countries in which the organization is currently operating. For the United States of America, please use the abbreviation USA without periods.

S.W.O.T. ANALYSIS

Note: Strengths and Weaknesses are Internal Measurements.

STRENGTHS: Please list what the organization considers to be its internal strengths.

Example: Staff experience, self-sustained funding, strong partnerships, etc.

WEAKNESSES: Please list areas in which the organization feels it is weak or needs improvement internally.

Example: Limited capacity for rapid expansion, poor fundraising, no employee evaluations and training, etc.

Note: Opportunities and Threats are External Circumstances.

OPPORTUNITIES: These are areas in which the organization feels they are going to be able to capitalize in the future.

Example: Local government initiatives to improve education, 12 requests for new schools from local communities, promised expansion of radio program to 12 new stations in coming year, etc.

THREATS: These are areas in which the organization feels its programs are vulnerable to disruption or ineffectiveness.

Example: Inadequate volunteer recruitment, civil unrest, poor security at facilities or on electronic databases/IT, etc.