Mid-Year Group Assessment Tool

Overview
Many organizations find it valuable to step back midway through the year to assess how they are functioning and where they are in terms of meeting objectives. Could your group use a mid-year tune-up? You may wish to use the following assessment tool to gather feedback from members, followed by group discussion and action plan. Save the data, and use the same tool at the end of the year to measure your progress.

Indicate YES or NO for each of the following:

If you answer “no” to any of these, you may click on the number next to the question to access some tips on how to improve in that particular area.

YES       NO

1. A transition period occurred during which outgoing officers trained new leaders (provide link to transition tips here).
2. Officers have written, detailed job descriptions.
3. Records from last year were passed on (e.g., financial records, project files).
4. Orientation and training was provided to prepare people for their job(s).
5. Members have been given an opportunity to interact informally and get better acquainted.
6. Team building activities are conducted at least once per quarter (provide link to team building tips here).
7. The group has clearly defined goals that are written down and frequently reiterated.
8. Goals are determined, accepted and understood by all members.
9. Action steps for reaching goals have been identified, tasks have been assigned, and progress is observable.
10. The group periodically reassesses its goals and performance.
11. Organizational policies and procedures are documented, known and adhered to by members.
12. The Constitution and By-Laws have been reviewed and meet the current needs of the organization and its constituents.
13. The group has a current budget and regular financial statements.
14. There are sufficient financial resources to perform the necessary functions of the group.
15. Meetings are worthwhile and have a purpose.
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16. Each meeting has an agenda that is distributed in advance.
17. Meeting date, time and location are well advertised.
18. Meetings begin on time and are set up comfortably.
19. All members attend meetings regularly.
20. Members are familiar with parliamentary procedure or an alternative process, and discussion and decision-making are facilitated in an orderly and predictable fashion.
21. Minutes of meetings are prepared in a timely fashion, are clear and concise, and are distributed to all constituents.
22. Members enjoy participating in the organization.
23. The executive board meets regularly and has a specific agenda.
24. All members are involved in group projects and decisions.
25. A climate exists which allows members to take risks or to acknowledge and discuss group problems.
26. Ample time is allowed at meetings to air and discuss concerns.
27. Officers keep each other and advisors informed regarding activities, problems, progress toward tasks, etc.
28. Committees have clearly established goals and members understand their purpose and what is expected of them.
29. Committee chairs give reports at all meetings.
30. The group is satisfied with its image and reputation in the eyes of the campus and the general public.