



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.