



Cohort Organizational Assessment For Nonprofits and Funders

Public Interest Management Group is a consulting firm that delivers strategic planning and organizational development services to nonprofits and social enterprises. Our analytic methods empower nonprofit leaders to make well-informed decisions and position their organizations for impact, operational efficiency and financial sustainability.

Overview of Organizational Assessment

Success Factor Analysis (SFA) is a unique methodology developed by PIMG to assess individual organizations' practices and characteristics relative to standards of effectiveness in nonprofit management. Realizing a need for tangible data and an objective basis for guiding organizational development, we built a system that incorporates 35 data metrics (success factors) that gauge essential aspects of a nonprofit's strategies, operations, culture, communications and revenue structure. Employing SFA, we evaluate clients on these factors. We also address organization-specific challenges and needs.

The assessment process includes interviews, surveys of stakeholders and analysis of internal documents. It has two outcomes: First, each organization receives a customized report of findings and recommendations – a narrative, an SFA scorecard, and an Organizational Success Index rating, which establishes a baseline for tracking future progress. Second, success factor data helps us understand traits linked to organizational success, which furthers collective understanding of best practices in nonprofit management.

Success Factor Analysis is designed to be administered concurrently to groups of 5-20 nonprofits. These organizations may share a common geographic region, field of service or funder relationship. Conducting the process with a cohort group allows efficiencies and economies of scale. This also generates a data set that will shed light on the group's traits and needs. Cohort assessment benefits funders and sponsors in several ways, for example by shedding light on collective needs for building nonprofits' capacity.

PIMG has tested this methodology with three cohorts and over 40 nonprofits, spanning three states and diverse fields of work. Pilot studies have demonstrated efficacy and built a strong baseline data set.

Deliverables

- Customized assessment reports for each participating nonprofit
- Debriefing/advisory sessions with participating executive directors
- Cohort data analysis summary
- Report to the funder/sponsor with findings and capacity-building recommendations.

Timeline and Cost

Cohort assessment timelines range from 3-6 months. The cost depends on the size of the cohort, and are estimated at \$50,000 for five nonprofits, \$75,000 for ten, \$87,500 for fifteen and \$100,000 for twenty.

Inquiries and Additional Information

To discuss Organizational Assessment or other management consulting services contact PIMG at (206) 282-7464. For more detail on Public Interest Management Group see our website, pimgconsulting.com.