

ABRIENDO PUERTAS SELF-ASSESSMENT TOOL

PURPOSE

This Assessment Tool will allow Abriendo Puertas to regularly evaluate organizational practices related to expansion management. The Bush School Capstone team will administer this assessment and use the results to offer Abriendo Puertas an expansion management model. In the future, Abriendo Puertas can regularly use this Assessment Tool to reevaluate its expansion efforts and to modify its expansion strategies accordingly.

INSTRUCTIONS

Please read and answer the following questions. To ensure complete and accurate assessment results, the Capstone team recommends including all relevant Abriendo Puertas employees with experience in the following organizational areas – Resource Development, Marketing & Community Outreach, and Volunteer Management – when taking the assessment.

I. Resource Development & Fundraising	Yes	No
1. Do you have a funding model that identifies where you expect your funding to come from each year? Please explain.	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a long term strategic plan for your fundraising targets?	<input type="checkbox"/>	<input type="checkbox"/>
3. What are your funding sources? a. Government Grants _____% b. ISDs _____% c. Foundation Grants _____% d. Individuals _____% e. Other _____% Please specify "Other" sources of funding:		
4. Are your fundraising efforts staffed and funded at a level consistent with funding expectations?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you have plans to hire more development staff as you grow?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you research prospective donors?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you maintain a donor database (do you keep records of past donors)? Please explain.	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you conduct an annual fundraising campaign?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have repeat donors? Please explain.	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you accept donations by mail?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you accept donations on your website?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do your past clients/volunteers become donors?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you have a well-developed case to encourage donors to support your organization?	<input type="checkbox"/>	<input type="checkbox"/>
14. Is fundraising a priority for your organization?	<input type="checkbox"/>	<input type="checkbox"/>

II. Marketing & Community Outreach	Yes	No
1. Do you have a marketing coordinator?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a written marketing plan?	<input type="checkbox"/>	<input type="checkbox"/>
a. Does your written marketing plan outline your goals/objectives, target markets, and methods/tools for achieving these goals?	<input type="checkbox"/>	<input type="checkbox"/>
b. Do you review and adapt your marketing plan each time you expand to a new location?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you consistently use your logo?	<input type="checkbox"/>	<input type="checkbox"/>
4. How do you want to be perceived by people outside your organization?		
5. Do your marketing efforts consistently promote this perception?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do your brochures, newsletters, annual reports, and other promotional materials present a coherent look and feel?	<input type="checkbox"/>	<input type="checkbox"/>
7. What marketing tools do you regularly use? (personal selling, direct mail, websites, etc.)		
8. Do you regularly update your website and use it for marketing efforts? If yes, how often?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you strategically identify potential schools and/or districts at which to implement your program? If yes, how?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you regularly look for free marketing opportunities within the community? (feature newspaper articles, letters to the editor, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you regularly pursue relationships with other similarly-minded organizations aside from GEAR UP?	<input type="checkbox"/>	<input type="checkbox"/>
12. Are you aware of any competing parental engagement programs? If yes, please list competing programs:	<input type="checkbox"/>	<input type="checkbox"/>

II. Marketing & Community Outreach (Continued)	Yes	No
13. Do you attempt to differentiate your program from potential competitors?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you research each new community you enter?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you continue to market your services once your program is established within a community in order to maintain a presence?	<input type="checkbox"/>	<input type="checkbox"/>
16. Do you regularly work with the community to make community members aware of the program?	<input type="checkbox"/>	<input type="checkbox"/>
17. Do you use marketing to maintain volunteer participation once the program is established in a location?	<input type="checkbox"/>	<input type="checkbox"/>
18. Do you have specific marketing materials for donors?	<input type="checkbox"/>	<input type="checkbox"/>
19. Do you regularly maintain contact with your donors?	<input type="checkbox"/>	<input type="checkbox"/>
20. Do you regularly recognize your donors?	<input type="checkbox"/>	<input type="checkbox"/>

III. Volunteer Management	Yes	No
1. Do you recruit parents to become involved with Abriendo Puertas? If yes, explain how.	<input type="checkbox"/>	<input type="checkbox"/>
2. When partnering with school districts, do the schools play a role in recruiting and supporting volunteers? If yes, explain.	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have detailed job descriptions for your parent volunteers? If yes, what are they?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you have a screening or selection process for your parent volunteers? If yes, please explain.	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you have a method for determining which parents will teach and mentor other parents? If yes, please explain.	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you train your volunteers? If yes, how?	<input type="checkbox"/>	<input type="checkbox"/>
<hr style="border-top: 1px dashed black;"/> <p>a. Who comes to your monthly meetings?</p> <p>b. What are concerns that volunteers generally deal with?</p> <p>c. Where are the meetings located?</p> <p>d. Is the training one time or ongoing?</p>		

III. Volunteer Management (Continued)	Yes	No
7. Do you keep minutes or records of trainings?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you track the involvement of your parent volunteer with Abriendo Puertas? If yes, please explain.	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you evaluate the work of your parent volunteers? If yes, please explain.	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you have a parent volunteer coordinator? If no, explain organization oversight of volunteers:	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you give your parent volunteers recognition for their work with your organization? If yes, explain.	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you motivate or encourage volunteers? If yes, explain how.	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you have a process for dealing with grievances of volunteers?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you keep volunteers informed of organizational events and/or program changes? If yes, explain how.	<input type="checkbox"/>	<input type="checkbox"/>

III. Volunteer Management (Continued)	Yes	No
15. Do you offer guidance or support for volunteers? If yes, explain how.	<input type="checkbox"/>	<input type="checkbox"/>
<p>a. What is the volunteer center?</p> <p>b. When is your volunteer center open?</p> <p>c. What are the concerns of parents who access this center?</p> <p>d. What are the strengths and weaknesses of the center?</p> <p>e. Do you have these volunteer centers at each program location?</p>		