

## **What makes a Successful Stewardship and Conservation Organization? - A Benchmarking Tool for your Organization -**

This is a short assessment tool designed to provide stewardship & conservation organizations with a general indication of their general strengths and weaknesses. It is based on the indicators developed and explored in the research paper: *What makes a Successful Stewardship and Conservation Organization?* (LTABC, July 2003).

You may find it useful to gather responses from a variety of people involved in the organization, such as staff, board, volunteers, and members. For a more in-depth exploration of organizational capacities, please refer to the McKinsey Capacity Assessment Grid, or to the Institute for Conservation Leadership's "Benchmarking Workbook" ([www.icl.org](http://www.icl.org)).

To use this tool, rate your response to each practice according to the following system:

1. Our organization does not have experience with this practice
2. We are working to develop this practice
3. We engage in this practice regularly in a competent manner
4. We engage in this practice regularly and can teach or model this practice to others

After responding to all of the questions, add up totals for each indicator. If you have ranked your organization with mainly 1 –2s, this indicates an area of work for your organization in strengthening your practices. If you have ranked your organizations with mainly 3 –4s, this indicates an area of strength that contributes to your organization's success.

### **Questions for Reflection:**

- 1) Of the areas you have identified as needing development, which are most important to the organization at this time? How might your organization devote time or resources to this area? How do these needs for development relate to your current activities?
- 2) Of the areas you have identified as areas of strength, which might be further built upon or expanded? How might your organization identify new directions, activities, or services based on these areas? How is your organization's success different from other stewardship and conservation organizations in Canada?
- 3) How are the responses of staff, board, volunteers, and members to this tool different? Why?
- 4) How might the strengths and weaknesses identified impact on the following: a) your organization's daily activities b) your organization's governance structure?

| <b>Indicator</b>                                                                                                                                 | <b>Practice</b>                                                                                                                                                                                       | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|
| <b>Vision &amp; Values</b>                                                                                                                       | Has a clear, concise vision and mission which staff, board, and members are able to articulate                                                                                                        |          |          |          |          |
|                                                                                                                                                  | Uses key messages or taglines in its communications which tie into the vision and mission of the organization                                                                                         |          |          |          |          |
|                                                                                                                                                  | Has a standardized method of selecting stewardship & conservation projects                                                                                                                            |          |          |          |          |
|                                                                                                                                                  | Above method is based on the organization's vision, mission, goals                                                                                                                                    |          |          |          |          |
|                                                                                                                                                  | Staff are able to articulate how their daily activities relate to the organization's mission                                                                                                          |          |          |          |          |
|                                                                                                                                                  | <b>TOTAL</b>                                                                                                                                                                                          |          |          |          |          |
| <b>Community Engagement</b>                                                                                                                      | Has a clearly defined community (either geographic or conceptual) that it serves                                                                                                                      |          |          |          |          |
|                                                                                                                                                  | Has a keen understanding of the needs of its community                                                                                                                                                |          |          |          |          |
|                                                                                                                                                  | Has a high level of local involvement in its projects:                                                                                                                                                |          |          |          |          |
|                                                                                                                                                  | a) community members participate as volunteers                                                                                                                                                        |          |          |          |          |
|                                                                                                                                                  | b) community members have input into shaping project priorities                                                                                                                                       |          |          |          |          |
|                                                                                                                                                  | c) community members can easily represent the project to others                                                                                                                                       |          |          |          |          |
|                                                                                                                                                  | d) community members can articulate benefits of the project to themselves and the public at large                                                                                                     |          |          |          |          |
|                                                                                                                                                  | Has a high level of members & supporters proportionate to the community it serves                                                                                                                     |          |          |          |          |
| Uses a variety of communication tools, including newsletters, emails, special events, news releases, interviews, advertising, opinion editorials |                                                                                                                                                                                                       |          |          |          |          |
|                                                                                                                                                  | Organizational structure facilitates community engagement (e.g. large organizations operate with decentralized staff, smaller organizations include outreach as a part of their job responsibilities) |          |          |          |          |
|                                                                                                                                                  | <b>TOTAL</b>                                                                                                                                                                                          |          |          |          |          |

| <b>Indicator</b>            | <b>Practice</b>                                                                                                                                                                                                          | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|
| <b>Sustainability</b>       | Is successful in researching and receiving grants from foundations or government                                                                                                                                         |          |          |          |          |
|                             | Runs in fee-for-service activities that are related to the overall goals of the organization                                                                                                                             |          |          |          |          |
|                             | Has developed organizational structure to allow for enterprising activities (e.g. incorporated an arm of the organization as a business)                                                                                 |          |          |          |          |
|                             | Has established an endowment fund that is growing in size                                                                                                                                                                |          |          |          |          |
|                             | <b>TOTAL</b>                                                                                                                                                                                                             |          |          |          |          |
| <b>Partnership Building</b> | Informally shares information with other organizations in the field on a regularly basis                                                                                                                                 |          |          |          |          |
|                             | Works with a variety of partners, such as alliances or federations, other related non-profits, professional associations, government agencies, corporate sponsors, industry, agricultural workers and private landowners |          |          |          |          |
|                             | Works with partners based on shared goals and objectives that can be easily articulated by all partners                                                                                                                  |          |          |          |          |
|                             | Staff spend time and resources developing working relationships with partners.                                                                                                                                           |          |          |          |          |
|                             | Organization's involvement in joint ventures is included as a part of its strategic priorities                                                                                                                           |          |          |          |          |
|                             | Organization has standardized procedures and protocols that it uses when working with partners                                                                                                                           |          |          |          |          |
|                             | Has been publicly recognized for its work in partnership – e.g. other partners represent organization positively to their constituents                                                                                   |          |          |          |          |
|                             | <b>TOTAL</b>                                                                                                                                                                                                             |          |          |          |          |

| <b>Indicator</b>                      | <b>Practice</b>                                                                                                                                | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|
| <b>Leadership &amp; Commitment</b>    | Organization has a diverse board that reflects its areas of focus                                                                              |          |          |          |          |
|                                       | Staff are involved in the decision making on projects and in organizational direction                                                          |          |          |          |          |
|                                       | Staff have:                                                                                                                                    |          |          |          |          |
|                                       | a) flexibility in projects                                                                                                                     |          |          |          |          |
|                                       | b) opportunities for creativity in their work                                                                                                  |          |          |          |          |
|                                       | c) a high level of responsibility                                                                                                              |          |          |          |          |
|                                       | Board and management are comfortable in delegating responsibility to staff.                                                                    |          |          |          |          |
|                                       | Staff have a strong sense of shared values and commitment to the organization                                                                  |          |          |          |          |
|                                       | Volunteer programs are targeted to meet organization's program needs                                                                           |          |          |          |          |
|                                       | Volunteer programs are designed to meet fundraising needs<br>Volunteers have a clear understanding of their rights and responsibilities        |          |          |          |          |
|                                       | <b>TOTAL</b>                                                                                                                                   |          |          |          |          |
| <b>Evaluation and Risk Management</b> | Organization uses evaluation systems that interrelate to strategic plans and measures                                                          |          |          |          |          |
|                                       | Board and staff have a clear understanding of risk management and this is reflected in their policies                                          |          |          |          |          |
|                                       | <b>TOTAL</b>                                                                                                                                   |          |          |          |          |
| <b>Technology</b>                     | Uses new technologies effectively, integrates into existing programs<br>Models of technology used are adopted by or shared other organizations |          |          |          |          |
|                                       | <b>TOTAL</b>                                                                                                                                   |          |          |          |          |
| <b>Diversity</b>                      | Organization develops programs and communications with the aim of reaching a diverse and broad community                                       |          |          |          |          |
|                                       | <b>TOTAL</b>                                                                                                                                   |          |          |          |          |