

Know Your Organization — LMS Course Handout

Good organizational documentation—covering the roles of the board, executive leadership, staff, and volunteers—helps establish boundaries, provides accountability, fosters workplace wellness, and supports the delivery of quality services. Organizational Wellness cultivates wellness in your workplace and among your volunteers and staff, who in turn cultivate wellness in the communities and people they serve.

Getting Started Checklist

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|---|-------------------------------------|
| ■ Mission / Vision / Purpose Statements | ■ Annual Report |
| ■ Program Brochures & Handouts | ■ Newsletters |
| ■ Website | ■ Social Media / Online Content |
| ■ Organizational Chart | ■ Bylaws / Constitution |
| ■ Grant Proposals | ■ Program Evaluations |
| ■ Intake Forms / Assessment Tools | ■ Strategic Plan |
| ■ Employee Handbook / Personnel Policies & Procedures | ■ Newspaper Articles / News Reports |
| ■ Press Releases | |

Know Your Organization: The Basics

Name & Address:

Year Founded:

Type of Organization:

- Government
- Non-profit
- Not-for-profit (secular or faith-based)
- For-profit

How Did the Agency Originate?

- Statute
- Voluntary association of stakeholders
- Established by another organization
- Bequest
- Merger
- Federation
- Other

Know Your Organization: Services

Geographic Catchment Area	Local Regional State National International Other
Districts or Branches	What districts or branches are there, if any?
Functions of the Agency	What are the primary functions?
Population Served	Who does the agency serve?
Membership	Is there a membership? If so, what are the qualifications?

Know Your Organization: Organizational Chart

Key Questions

- What major departments are there, if any?
- Number of staff positions & percentage of authorized positions filled
 - Administrative staff count
 - Professional staff count
 - Clerical staff count
 - Other staff count
 - Number of volunteers, if applicable

Know Your Organization: Structure and Processes

Governance Questions

Ultimate Control	What group or individual holds ultimate control?
Board Type	Is there a board? What is called? Is it a directive/policy-making board or an advisory board?
Board Selection	How are board members elected or appointed?
Executive Appointment	Who appoints the executive staff?

What document(s) is the source of administrative authority for the agency?

- Law
- Executive Order
- Charter (Papers of Incorporation)
- Constitution
- Bylaws
- Other

Document Questions

Adopted / Promulgated by	By whom was this document adopted or promulgated?
Topics Covered	What topics does this document cover?
Amendment Process	How can the document be amended or revised?

Know Your Organization: Funding

Is the agency:

- Branch of a local, state, or national agency
- Member of a United Way or other funding federation
- Member of a community-welfare council or council of agencies

Approximate current budget or total expenditures for the last fiscal year:

\$ _____

Employee Handbook Essentials

■ Purpose of Employment Policies	■ Introduction: Mission, Vision, Values
■ Employment Practices and Policies	■ New Employee Orientation
■ Performance Evaluations	■ Staff Training & Education
■ Standards of Conduct	■ Code of Business Ethics and Conduct
■ Disciplinary Policies & Actions	■ Conflict Resolution (Grievances)
■ Compensation & Employment Status	■ Benefits
■ Separation of Employment	■ Drug-Free Workplace
■ Conflict of Interest	■ Travel
■ EEO & Affirmative Action	■ ADA / ADAAA Compliance
■ Sexual Harassment	■ Workplace Violence
■ Gift Acceptance	■ Whistleblower
■ Government & Political Activity	■ Volunteers
■ Safety and Emergency Procedures	■ Social Media
■ Information Technologies & Mobile Phones	■ Receipt of Policy Manual