



Center Assessment
Consultation Program

*A Check-Up
for Your Organization*



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Foundation

The Center Assessment Consultation was created at the request of Heartbeat affiliates to provide a comprehensive review of individual center operations, management, and governance.

This on-site assessment was designed around Heartbeat's *Health Assessment for Your Organization*, originally designed to be a self-assessment tool for use by directors and boards. The on-site Center Assessment is an extension of that tool customized to address your organization's particular needs and to address your own unique issues and opportunities. 12 key areas are addressed in the on-site visit.

Structure

The first step of the Center Assessment is an overview of essential documents prior to the on-site visit. The center will be requested to provide these documents and send them to the Heartbeat consultant two weeks before the visit.

Centers must send as many of these items as possible prior to the visit:

1. Organizational chart
2. Board member job description
3. "Recruitment" packet given to potential board members (if applicable)

4. Board Committee structure (if applicable)
5. Mission Statement
6. Document of current strategic plan or annual goals and objectives
7. Current budget
8. Most recent financial statement
9. All staff job descriptions
10. Copy of staff evaluation form (blank)
11. Document of fundraising plan or fundraising schedule
12. Year-end statistical report for last full year completed

These documents can be in working form. There is no need to spend time "sprucing" them up. We are reviewing for content, not outward appearance.

The consultant will come on-site for a total of two days. The first day must be a day when the center is in full operation and the consultant can observe program services, including medical if any, of the organization. The second day will focus on infrastructure. On the evening of the second day, the consultant will meet with the Board of Directors and key staff members to present findings and to make recommendations based on research and observation. A written report will be provided.

Personnel

Center Assessment can be conducted by trained Heartbeat consultants such as Jane Maxfield and Sheila Boyle, who both have years of experience and expertise in starting and strengthening centers.

Fee Structure

The Center Assessment is \$700.00 plus expenses. The consultant is pleased to stay in a private home to keep expenses down or you may provide accommodations at a local hotel. You are required to pay transportation costs and all meals while the consultant is with you.

Scheduling an Assessment

For more information on the Center Assessment Consultation, or to schedule a Center Assessment for your organization, please contact the Heartbeat International office:



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