L & E INNOVATIVE BUSINESS SOLUTIONS LLP

THE CLARITY-TO-CAPACITY™ ORGANIZATIONAL ASSESSMENT

Identify the Misalignment. Understand the Need. Move Toward the Right Solution.

Organization / Business Name:	_____
Primary Contact:	_____
Email / Phone:	_____
Date Completed:	_____

A practical client preparation tool for organizations, businesses, nonprofits, ministries, and leaders who want clarity about their organizational needs.

Before You Begin

Organizations rarely experience challenges because everything is wrong. More often, an organization may have a strong mission, committed leadership, capable employees, valuable programs, and a history of success—while one or more areas have become misaligned with its current direction.

This assessment is a structured starting point to help you step back, examine what is happening, identify patterns, clarify concerns, and determine where focused consulting support may be needed.

This is not a strategic plan or a professional organizational diagnosis. It is not intended to replace legal, financial, human resources, accounting, clinical, regulatory, or other specialized professional services.

What this assessment can help you identify

- where your organization appears to be functioning well
- where concerns are emerging
- where areas may be disconnected from one another
- where leadership may need additional information
- where organizational capacity may be strained
- what type of consulting support may be appropriate
- what questions should be brought into a consultation

How to Use This Assessment

1. Answer honestly — Respond to what is actually happening—not what you think should be happening.

2. Look for patterns — One concern may be isolated; repeated concerns across connected areas may signal a broader alignment issue.

3. Distinguish symptoms from needs — Ask: Is this the actual problem—or is this what the problem looks like?

4. Identify the support you need — Use the assessment to clarify where focused consulting support may help.

5. Do not rush the solution — Identifying the concern is different from determining the right solution.

I. Organizational Direction

Our mission remains relevant to the work we are doing today.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Our leadership has a shared understanding of where the organization needs to go.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Our current strategic priorities reflect the organization's present environment.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

We know what success should look like over the next 1–3 years.

☐ Yes ☐ Partially ☐ No ☐ We need help determining this

What has changed since our current strategic plan was developed?

_____

_____

II. Leadership & Governance

Leadership responsibilities are clearly defined.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Decision-making authority is clear.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

Leadership communicates organizational priorities effectively.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Board and executive leadership understand their respective responsibilities.

☐ Yes ☐ Mostly ☐ Unsure ☐ No ☐ Not applicable

Where do you believe leadership or governance needs strengthening?

_____

_____

III. Organizational Structure

Our organizational structure supports the work we are currently doing.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Employees understand who is responsible for what.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

There are clear reporting relationships.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

We have appropriate management capacity for our current size and complexity.

☐ Yes ☐ Mostly ☐ Unsure ☐ No

Are there duplicated responsibilities, gaps, bottlenecks, or unclear roles?

_____

_____

IV. Programs, Products & Services

Our programs/products/services continue to meet current needs.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Our programs/products/services are aligned with our mission and strategic direction.

☐ Yes ☐ Mostly ☐ Some are ☐ No ☐ Unsure

We have adequate capacity to deliver what we currently offer.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

Are there programs, services, or products that may need to be redesigned, expanded, reduced, or discontinued?

_____

_____

V. Workforce & People

We have the right people and skills to accomplish our current priorities.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

Staff understand their responsibilities and performance expectations.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

Our organization provides adequate leadership and professional development.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

Staff capacity is adequate for the organization's current workload.

☐ Yes ☐ Mostly ☐ Unsure ☐ No

What workforce concern is most affecting the organization?

_____

_____

VI. Operations & Internal Systems

Our internal processes allow work to move efficiently.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

We know where operational bottlenecks occur.

☐ Yes ☐ Mostly ☐ Somewhat ☐ No

Our systems support our current size and level of activity.

☐ Yes ☐ Mostly ☐ Unsure ☐ No

Our administrative systems support our work.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

What operational issue creates the greatest challenge?

_____

_____

VII. Financial & Resource Alignment

Our resources are aligned with our organizational priorities.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

We understand the resources required to accomplish our strategic priorities.

☐ Yes ☐ Mostly ☐ Unsure ☐ No

Our revenue/funding strategy supports organizational sustainability.

☐ Yes ☐ Mostly ☐ Unsure ☐ No

Are there financial or resource limitations affecting your ability to execute your strategy?

_____

_____

VIII. Partnerships & External Positioning

Our organization has the partnerships necessary to support its goals.

☐ Strongly Agree ☐ Agree ☐ Unsure ☐ Disagree ☐ Strongly Disagree

We clearly communicate our value to external stakeholders.

☐ Yes ☐ Mostly ☐ Inconsistent ☐ No

We know which strategic partnerships could accelerate our goals.

☐ Yes ☐ Somewhat ☐ Unsure ☐ No

What external opportunity are you currently not positioned to take advantage of?

_____

_____

IX. Measurement & Accountability

We have meaningful measures for determining whether we are succeeding.

☐ Yes ☐ Mostly ☐ Somewhat ☐ No

Leadership regularly reviews progress against organizational priorities.

☐ Yes ☐ Mostly ☐ Inconsistently ☐ No

When something is not working, we have a process for determining why and responding.

☐ Yes ☐ Mostly ☐ Inconsistently ☐ No

What important outcome are you currently struggling to measure?

_____

_____

X. The Alignment Check

Now step back and review your answers. Do you see concerns appearing in multiple sections? Several concerns occurring across connected areas may point toward a broader organizational alignment, capacity, structural, leadership, or business-development issue.

- Workforce concerns + unclear structure + operational problems may point toward a broader organizational capacity or structural issue.
- Revenue concerns + program concerns + unclear positioning may point toward a business development or strategic alignment issue.
- Leadership concerns + governance concerns + unclear decision-making may indicate a leadership or governance issue.

The purpose is not to diagnose yourself. The purpose is to identify where focused consulting support may be warranted.

What Appears to Be Working?

List three areas that you believe are currently functioning well.

1.

_____

_____

2.

_____

_____

3.

_____

_____

A strong organization does not need to rebuild everything. Sometimes the goal is to protect what works while strengthening what does not.

What Appears to Be Misaligned?

Area	What are you experiencing?	Significance
1. _____	_____	☐ Low ☐ Moderate ☐ High
2. _____	_____	☐ Low ☐ Moderate ☐ High
3. _____	_____	☐ Low ☐ Moderate ☐ High
4. _____	_____	☐ Low ☐ Moderate ☐ High
5. _____	_____	☐ Low ☐ Moderate ☐ High

The "Why" Behind the Problem

What are we experiencing?

_____

_____

Who is affected?

_____

_____

When did we first notice it?

_____

_____

What have we already attempted?

_____

_____

What happened when we attempted it?

_____

_____

What do we believe may be contributing to the issue?

_____

_____

What do we NOT know yet?

_____

_____

What would we like L & E Innovative Business Solutions LLP to help us determine?

_____

_____

Identifying Your Potential Need

☐ Strategic Planning / Strategic Plan Update
☐ Organizational Development
☐ Organizational Assessment
☐ Leadership Development
☐ Executive / Management Support
☐ Board / Governance Development
☐ Program Development

☐ Workforce / Team Development
☐ Operational Improvement
☐ Organizational Restructuring
☐ Business Development
☐ Strategic Partnerships
☐ Revenue / Funding Strategy
☐ Grant Readiness
☐ Government Contracting Readiness
☐ Market / Opportunity Assessment
☐ Change Management
☐ Performance Measurement
☐ Rebranding / Organizational Positioning
☐ Global Business / Partnership Development
☐ Other

Your Consulting Conversation Starter

Use these prompts to prepare for a conversation with L & E Innovative Business Solutions LLP.

“Our organization is seeking support because…”

_____

_____

_____

“The primary concern we want to address is…”

_____

_____

_____

“We believe the concern may be connected to…”

_____

_____

_____

“We need help determining…”

_____

_____

_____

“If this engagement is successful, we want to see…”

_____

_____

_____

Your Preliminary Needs Map

We Know	We Suspect	We Need Help Determining
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The “We Need Help Determining” column may reveal where focused consulting support can create the greatest value.

Before You Make Major Changes

Do not assume that identifying a problem means you already know the solution. Before implementing major organizational changes, consider:

Have we gathered enough information? ☐ Yes ☐ No ☐ Unsure

Have the appropriate stakeholders been heard? ☐ Yes ☐ No ☐ Unsure

Have we identified the underlying issue rather than only the symptom? ☐ Yes ☐ No ☐ Unsure

Do we have the internal capacity to implement the change? ☐ Yes ☐ No ☐ Unsure

Do we understand potential risks and unintended consequences? ☐ Yes ☐ No ☐ Unsure

Are we ready for focused consulting support? ☐ Yes ☐ No ☐ Unsure

YOUR NEXT STEP

You Don't Have to Figure It All Out Alone.

If this assessment helped you identify a concern, question, opportunity, or area that feels misaligned, the next step is a conversation.

FREE 15-MINUTE CONSULTATION

A focused conversation to help you clarify what you are experiencing, what you need to determine, and whether L & E Innovative Business Solutions LLP can help.

✓ Bring your completed assessment.

✓ Tell us what is working.

✓ Tell us where you are experiencing challenges.

✓ Tell us what you want to accomplish.

✓ Let's identify the most appropriate next step.

Schedule your FREE 15-minute consultation

www.thejourneytomycup.com

coachlisaallen@thejourneytomycup.com

L & E Innovative Business Solutions LLP

Strategic Planning | Organizational Development | Program Development | Workforce Development | Leadership Development | Strategic Partnerships | Business Development

Important Notice: This assessment is an educational and organizational preparation tool. Completion does not constitute a professional organizational diagnosis, legal opinion, financial assessment, human resources determination, regulatory determination, or other specialized professional advice.