

Capacity Assessment Survey

The purpose of this worksheet is to stimulate your thinking about topic areas for potential collaboration. This worksheet is for **YOUR INTERNAL AGENCY USE ONLY TO COMPLETE THE OTHER PREWORK ASSIGNMENT AND WILL NOT BE SHARED WITH OTHER AGENCIES OR WITH THE CONSULTANT TEAM.** However, please keep a copy of your responses to this survey for discussion with Strategy Solutions during the interview process that follows the first meeting.

Please review each of the following organizational functions and circle the response which best describes your agency’s internal capacity and/or capabilities in that area. Try to be as honest as possible in your self-assessment. If a particular area does not apply to your organization, please mark “not applicable.” Put a “check mark” next to any areas where you would be willing to discuss collaboration, joint purchasing or possible staff sharing.

✓ if this is an area of interest for collaboration	<b>Business Function</b>	We are exemplary in this area and could assist others	We are doing very well in this area /no capacity building need	We are doing ok but could make some improvements	We need a lot of work in this area	Does Not Apply
	<b>Sales/Case for Support</b>					
	1. Written and/or Video Client Testimonials	Super	None	Some	Lots	NA
	2. Educational program/webinar content/ development materials	Super	None	Some	Lots	NA
	3. Community educational programming: calendar, topics & audiences	Super	None	Some	Lots	NA
	4. Trade show targets and calendar (exhibits & training programs)	Super	None	Some	Lots	NA
	5. Technical and collateral materials to support the sales process	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Sales</b>					
	6. Prospecting /Identification of Opportunities	Super	None	Some	Lots	NA
	7. Qualifying & Educating Prospects	Super	None	Some	Lots	NA
	8. Moving high potential prospects to contract	Super	None	Some	Lots	NA
	9. Handoff to operations team/program implementation	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					

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	<b>Marketing</b>					
	10. Marketing to and through referral channels	Super	None	Some	Lots	NA
	11. Providing support for referral channels	Super	None	Some	Lots	NA
	12. Community Outreach	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Branding, Communications &amp; Advertising</b>					
	13. "Branding" Look and Feel/Messaging	Super	None	Some	Lots	NA
	14. Marketing Plan Development	Super	None	Some	Lots	NA
	15. Collateral Material Development	Super	None	Some	Lots	NA
	16. Media & Advertising	Super	None	Some	Lots	NA
	17. Social media account management	Super	None	Some	Lots	NA
	18. Website/Search engine optimization	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Public Relations/Communications</b>					
	19. Press Releases	Super	None	Some	Lots	NA
	20. Local/Regional Media Relations	Super	None	Some	Lots	NA
	21. Local/Regional Strategic Relationship Building and Outreach	Super	None	Some	Lots	NA
	22. Community Benefit (tabulating and reporting what we are doing for the community/for free)	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					

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	<b>Customer Service/Administrative</b>					
	23. Mail/ Phone/ In Person/ E-mail- Incoming; reception and phone answering	Super	None	Some	Lots	NA
	24. Mail/ Phone/ In Person/ E-mail- Outgoing	Super	None	Some	Lots	NA
	25. Mailings/mail management	Super	None	Some	Lots	NA
	26. Copying/office equipment/machines	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Co-Pay/Fee for Service Collection</b>					
	27. Point of service co-pay and/or fee for service collection	Super	None	Some	Lots	NA
	28. Payment recording	Super	None	Some	Lots	NA
	29. Tracking collections	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Billing/Claims/Collections</b>					
	30. Records Coding	Super	None	Some	Lots	NA
	31. Enter claims /billing	Super	None	Some	Lots	NA
	32. Accounts Receivable Management	Super	None	Some	Lots	NA
	33. Data analysis to complete rate adjustments and adjust billing rates	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>State/Compliance Reporting</b>					

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	34. Annual Audit	Super	None	Some	Lots	NA
	35. HIPAA Compliance	Super	None	Some	Lots	NA
	36. Adverse Events Reporting	Super	None	Some	Lots	NA
	37. Continuing Education	Super	None	Some	Lots	NA
	38. License Renewal	Super	None	Some	Lots	NA
	39. Accreditation Preparation and Management	Super	None	Some	Lots	NA
	40. Technical Assistance	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Outcomes Measurement &amp; Management</b>					
	41. Logic Model Development	Super	None	Some	Lots	NA
	42. Research Hypothesis Development	Super	None	Some	Lots	NA
	43. Developing Measurement and Data Tracking Systems	Super	None	Some	Lots	NA
	44. Data Reporting Systems	Super	None	Some	Lots	NA
	45. Using Data for Quality/Process Improvement	Super	None	Some	Lots	NA
	46. Dashboard Development	Super	None	Some	Lots	NA
		Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Strategic &amp; Product Planning</b>					
	47. Industry analysis/environmental assessment	Super	None	Some	Lots	NA
	48. Visioning	Super	None	Some	Lots	NA
	49. Strategic Profile Development (identifying products & targets for growth)	Super	None	Some	Lots	NA

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	50. New product/service development	Super	None	Some	Lots	NA
	51. Project management (new initiatives)	Super	None	Some	Lots	NA
	52. Operations/tactical planning (including process changes based on customer needs)	Super	None	Some	Lots	NA
	53. Collaboration and partnerships	Super	None	Some	Lots	NA
	54. Product/Market Positioning Strategy (how each product is positioned in each market)	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Market Research</b>					
	55. New product development concept testing	Super	None	Some	Lots	NA
	56. Customer satisfaction surveys	Super	None	Some	Lots	NA
	57. Focus Groups and interviews	Super	None	Some	Lots	NA
	58. Voice of the customer feedback – integration of client wants and needs into operations/ customer Relationship Management	Super	None	Some	Lots	NA
	59. Market expansion market research (including generating leads for new business)	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Customer Relationship Management</b>					
	60. List management	Super	None	Some	Lots	NA
	61. Relationship Management Process (keep clients connected with the organization)	Super	None	Some	Lots	NA

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	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Human Resources</b>					
	62. Benefits	Super	None	Some	Lots	NA
	63. Compensation	Super	None	Some	Lots	NA
	64. Salary Administration	Super	None	Some	Lots	NA
	65. Employment	Super	None	Some	Lots	NA
	66. Employee Relations	Super	None	Some	Lots	NA
	67. Recruitment of independent agents	Super	None	Some	Lots	NA
	68. Management of independent agents	Super	None	Some	Lots	NA
	69. Succession Planning (emergency & long term)	Super	None	Some	Lots	NA
	70. Employee Development Planning	Super	None	Some	Lots	NA
	71. Talent Management Systems (tracking training and employee development goals)	Super	None	Some	Lots	NA
	72. Employee Mandatory Training (OSHA, Safety, HIPAA, etc)	Super	None	Some	Lots	NA
	73. Specialized Employee Training	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Legal</b>					
	74. Management of Legal and Liability Matters	Super	None	Some	Lots	NA
	75. Legal Compliance and Accountability	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Information Systems</b>					

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	76. Long Term IT/Systems Planning	Super	None	Some	Lots	NA
	77. Business Process Software	Super	None	Some	Lots	NA
	78. Patch management and software updates	Super	None	Some	Lots	NA
	79. Help Desk	Super	None	Some	Lots	NA
	80. Network/Communications/Server Management	Super	None	Some	Lots	NA
	81. Network security and firewalls	Super				
	82. Telecommunications	Super	None	Some	Lots	NA
	83. Hardware	Super	None	Some	Lots	NA
	84. Disaster Recovery	Super	None	Some	Lots	NA
	85. Hardware/Software/Internet monitoring	Super	None	Some	Lots	NA
	86. Infomatics: data mining, data and utilization analysis	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Accounting/Finance</b>					
	87. Accounts Payable	Super	None	Some	Lots	NA
	88. Accounts Receivable	Super	None	Some	Lots	NA
	89. Cost Accounting (direct & indirect cost analysis)	Super	None	Some	Lots	NA
	90. Profitability Analysis by Program	Super	None	Some	Lots	NA
	91. Purchasing	Super	None	Some	Lots	NA
	92. Financial Modeling and Forecasting	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Facilities</b>					
	93. Preventative Maintenance	Super	None	Some	Lots	NA

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	94. Capital/Renovation Needs	Super	None	Some	Lots	NA
	95. New Building/Expansion Needs	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Board Development</b>					
	96. Board Succession Planning & Recruitment	Super	None	Some	Lots	NA
	97. Board Orientation and Training	Super	None	Some	Lots	NA
	98. Board Performance Assessment and Development	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					
	<b>Fundraising</b>					
	99. Annual appeals	Super	None	Some	Lots	NA
	100. Signature Events	Super	None	Some	Lots	NA
	101. Major Gifts/Planned Giving	Super	None	Some	Lots	NA
	102. Capital Campaign	Super	None	Some	Lots	NA
	<b>Please list ideas/suggestions for improvement:</b>					

Any other ideas that come to mind not included above: