

Is Agile Assessment Right for Your Organization?

What parts of your organization might need to be assessed?

By Aurelia Aceves Hogan

A key ingredient for a successful nonprofit is regular reflection and assessment. This means periodically looking inward and judging if your goals, objectives, and mission are on target – and then changing and optimizing your programs, processes, and workflows accordingly.

But assessments can vary widely in scope and intent; they're not one-size-fits-all. One particular type of assessment our team uses frequently is the "agile assessment."

Why Be Agile?

What makes an agile assessment special? Agile assessments aren't intended to provide broad conclusions about a whole organization but rather to focus on specific programs and campaigns that require more careful analysis. Agile assessments are also more than just audits: They produce concrete, actionable strategies for performance management that support the growth and capacity of specific programs or processes.

For a great example of an agile assessment, take a look at the recent "Make Compost, Not Trash" campaign by the New York City Department of Sanitation. The department sought to better understand the impact and needs of the targeted audience of the campaign. To do so, the team gathered feedback and opinions from residents through focus groups, pored over the resulting data, and concluded with a detailed report that captured measurable data on how the campaign was faring – and all this in less than nine weeks. That's agile.

Ask These Four Questions

For nonprofit leaders who wonder if an agile assessment is right for their organization, or for those who are ready to roll up their sleeves and get started, here are four things to know about the process – four phases that are strict in structure to ensure an organization stays focused – and four questions to ask yourself:

1. Knowledge: What knowledge does your team need to develop – and why? Your answers will provide the foundation for what you're assessing.

2. Data: What information needs to be collected to build this knowledge, and how can you collect it? Answers to these questions orient your organization in terms of what data you

need to collect, from program performance to fundraising metrics and mission impact. Collection methods might entail interviews, focus groups, or surveys.

3. Change: Based on the data, what changes do you need to make? This is a time to analyze the data from phase two and uncover patterns.

4. Implementation: How can you implement these changes and continue to improve over time? Now is the time to put your analysis into action, making long-term changes to your programs and campaigns.

Include Everyone

Agile assessments should be inclusive. For an agile assessment to be successful, it can't be conducted in a closed-off or siloed environment. If only a select few people have input on the assessment behind closed doors, your organization will miss out on key insights.

Instead, the process should include all members of the organization who are involved with the program being assessed – from interns all the way up to executive leadership. Engage external stakeholders, too: Collect data and solicit opinions from your funders and from those your programs and campaigns affect.

Be Quick about It

An agile assessment is a relatively fast process. While a traditional, organization-wide assessment of a nonprofit can last a year (or more), agile assessments are more surgical. With their narrow focus, they can be conducted in fewer than two months. Indeed, fast and efficient are the core characteristics of agile assessment.


Of course, if an organization encounters obstacles and hurdles, it's okay to extend the length. After all, the end goal is a thorough assessment, not speed. However, a short timeline will force your team to address the key questions at hand and ensure efficiency throughout the assessment process.

“Agile assessments are more than just audits.”

Create a Ripple

No two agile assessments are alike. While the big-picture structure of agile assessments is similar (see the above four phases), no two assessments are the same on a granular level. Indeed, assessments should be as varied as the programs and campaigns that different nonprofits provide.

The varied nature of assessments can include using data-gathering techniques based on the needs of your program community or designing metrics specifically geared to measure impact and outcomes for one type of process. Don't allow generalizations. Instead, ask questions, collect data, and apply analysis methods that are uniquely tailored to the program or campaign you're assessing.

Nonprofits are made up of many smaller moving parts, and often just one of those parts – and not the entire organization – needs fine tuning. That's where agile assessments come in. With the right approach, you can improve a specific program or campaign, which will then have ripple effects across the entire organization. 

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“All this in less than nine weeks.”

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