



# Strategic Restructuring for California Community Clinics: Self-Assessment Workbook

THE PURPOSE OF THIS ASSESSMENT instrument is to assist your organization in determining its readiness to undertake a strategic restructuring process. The questions on pages 2–18 are designed to stimulate thinking and discussion about your organization’s strengths, assets, and challenges, and on how these might be leveraged, strengthened, and/or addressed by partnering with another organization. This process can be best accomplished through candid discussion within the organization that includes board, management team, and staff (either all staff or a representative group, depending upon the size of the organization). Seeking various perspectives from within your organization enriches the discussions, and ultimately provides better guidance regarding strategic restructuring options.

For each area listed, please consider and indicate your answers to the following questions:

- How would you characterize your organization’s current capacity in this area (using the capacity continuum provided)?
- What are your key strengths or assets? How might they be leveraged through strategic restructuring?
- To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?
- What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?
- To what degree does/do the organization(s) with which you are considering partnering

compensate for your shortcomings in this area?

This tool asks you to rate your organization’s strengths on a continuum. The descriptions on the capacity continuum may not fit your organization exactly. Feel free to highlight elements from different boxes where more than one description applies to your situation. For example, if one line of service is significantly different than another, you may circle two different numbers and explain this in the narrative (box). Similarly, you may not have identified a potential organizational partner at this point, or you may have identified more than one. In either case, we encourage you to adapt your discussions (and responses) accordingly. When thinking about potential partners, consider organizations that share your mission and/or organizations that you believe would complement your organization’s work.

Other organizations that have used this assessment tool found it useful to have different staff and even board members complete the form individually and then come together to discuss their individual results. Doing this can highlight some important perspectives as you consider your next steps.

Questions on pages 19–20 look more generally at strategic restructuring, and ask you to consider how restructuring might help your organization respond proactively to changes in your environment, innovate, grow, and/or expand your impact.

Type your answers in the PDF form fields in each section.

# WORKBOOK

## I. Services

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1
<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Strong</b></span> <span style="font-size: 2em;">←</span> <span style="flex-grow: 1; text-align: center; border-bottom: 2px solid black; position: relative;"> <span style="position: absolute; top: -5px; left: 50%; transform: translate(-50%, -50%); font-weight: bold;">CAPACITY</span> </span> <span style="font-size: 2em;">→</span> <span><b>Weak</b></span> </div>									
<p>We excel in the services that we provide. These services anticipate and are well aligned to meet constituents' needs. We offer unique services that others do not, or provide them with a level of capacity, quality, or expertise that competitors lack.</p>	<p>We are well positioned to offer the services we provide. These services effectively meet constituents' needs. We offer services that few others do, or provide them with a level of capacity, quality, or expertise that few can match.</p>	<p>We have adequate capacity to offer the services we provide, which are generally sufficient to meet constituents' needs. We do not offer unique services, but the services we do provide we do with a solid level of capacity, quality, or expertise.</p>	<p>We stretch our capacity to offer the services we provide, and as such we sometimes fail to meet constituents' needs. We do not offer unique services, and it is sometimes a struggle to deliver services with adequate levels of capacity, quality, or expertise.</p>	<p>We do not have the capacity to deliver the services we must provide in order to meet constituents' needs. We do not offer unique services, and it is often a struggle to deliver services with adequate levels of capacity, quality, or expertise.</p>					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## II. Staffing and Workforce

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1		
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<p>We have a demonstrated ability to attract and retain high-quality staff. All our staff are well equipped with the knowledge and expertise required to deliver our services, and many are recognized as experts in their field.</p>	<p>We are able to attract and retain well-qualified staff. All our staff have the knowledge and expertise required to deliver our services, and a few are recognized as experts in their field.</p>	<p>We can adequately staff our services. Although our staff are qualified and knowledgeable, none stand out as recognized experts in their field.</p>	<p>We struggle to attract and retain staff with the knowledge and skills necessary to deliver needed programs.</p>	<p>We do not have the staff expertise necessary for the delivery of all of the programs our constituents need.</p>							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

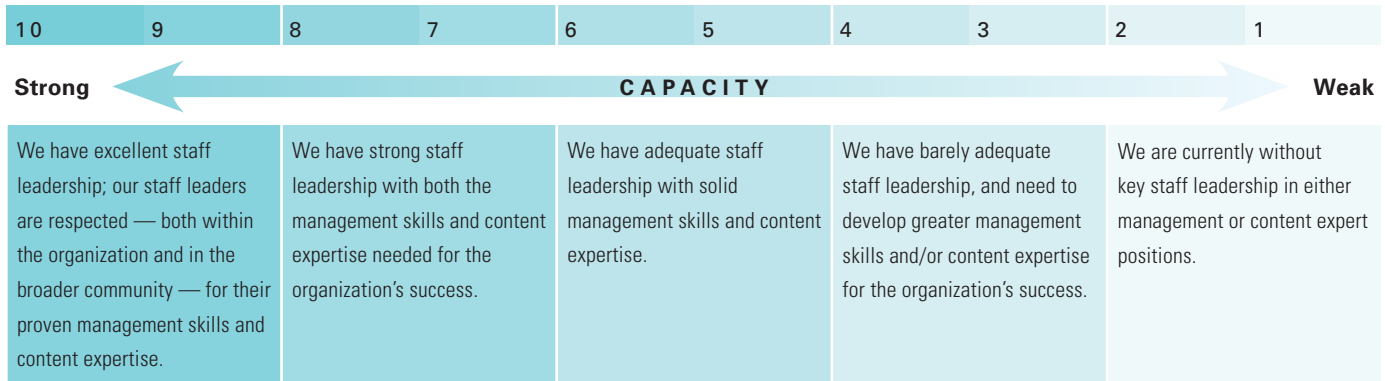
D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

### III. Leadership

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.



A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

#### iv. Board

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1
<b>Strong</b> ← <b>CAPACITY</b> → <b>Weak</b>									
<p>We have a high-functioning board that provides strong strategic and fiduciary guidance, represents the organization in the community, and helps raise needed funds. The board and executive director/CEO effectively work as partners for the benefit of the organization.</p>	<p>We have a board that is good at fulfilling its aggregate roles and individual responsibilities. The board and executive director/CEO work very well together.</p>	<p>We have a board that fulfills the most basic board functions. The board and executive director/CEO work fairly well together.</p>	<p>Our board sometimes struggles to fulfill its basic roles and responsibilities. The board and executive director/CEO often find themselves at odds.</p>	<p>Our board is largely dysfunctional; it does not consistently meet its basic responsibilities and board members do not work well together and/or experience antagonism with the executive director/CEO.</p>					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## v. Financial Position

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

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We can comfortably fund all organizational operations and services, and we have a surplus with which to fund reserves. We have greater access to loans/lines of credit than we need and/or have excellent access to liquidity.	We have been able to fund our operations and services this year without making any cuts in expenses, and anticipate the same next year. We are managing any debt with great success and have good access to liquidity.	We are keeping our head above water for now. We are managing any debt adequately and/or have some access to liquidity.	We will have a deficit this year and are not certain that we can make any further cuts in expenses without harming service delivery. We are carrying more debt than we should and/or have minimal access to liquidity.	We are in significant financial trouble with multi-year deficits that make our future very uncertain. We are carrying more debt than we can service and/or have poor access to liquidity.							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## vi. Financial Management

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1	
<b>Strong</b> ← <b>CAPACITY</b> → <b>Weak</b>										
We have a robust financial management function, with the staffing and systems to accurately account for revenue and expenses and to generate timely financial reports. Our billing function is excellent, and our accounts receivable status is very good.	Our financial function is good; our staffing and systems are well equipped to meet our accounting and reporting needs. Our billing function is strong, and our accounts receivable status is good.	Our financial management function is adequate; our staffing and systems rarely have a problem meeting our accounting and reporting needs. Our billing function and accounts receivable status are both adequate.	Our financial management function is barely adequate; our staffing and systems are stretched to deliver accurate accounting and reporting. Our billing function needs work and our accounts receivable status is of minor concern.	Our financial management function is inadequate to our needs; we lack the staffing and systems to ensure accurate accounting and reporting. Our billing function is inadequate and our accounts receivable status is of major concern.						

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## VII. Compliance

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

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We have state-of-the-art systems in place to effectively prevent, detect, and resolve any inappropriate business practices, improper conduct, and/or violations of law. We systemically engage in ongoing efforts to improve the quality of our operational performance.	We have strong systems in place to prevent, detect, and resolve any inappropriate business practices, improper conduct, and/or violations of law. We are engaged in continuing efforts to improve the quality of our operational performance.	We have adequate systems in place to effectively prevent, detect, and resolve any inappropriate business practices, improper conduct, and/or violations of law. We often engage in efforts to improve the quality of our operational performance.	The systems we have in place to prevent, detect, and resolve any inappropriate business practices, improper conduct, and/or violations of law need improvement. We sporadically engage in efforts to improve the quality of our operational performance.	The systems we have in place to prevent, detect, and resolve any inappropriate business practices, improper conduct, and/or violations of law are ineffective. We are not currently engaging in efforts to improve the quality of our operational performance.							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?



## VIII. Contracts

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

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<p>We are highly satisfied with the range, number, and terms of our contracts. We are typically successful in negotiating favorable terms for new contracts. We have several ongoing/renewable contracts supporting core programs and services.</p>	<p>We are mostly satisfied with the range, number, and terms of our contracts. We are often successful in negotiating favorable terms for new contracts. We have some ongoing or renewable contracts supporting core programs and services.</p>	<p>We are neither satisfied nor dissatisfied with the range, number, and terms of our contracts. We have had adequate success in negotiating favorable terms for new contracts. We have a few ongoing or renewable contracts supporting core programs and services.</p>	<p>We are somewhat dissatisfied with the range, number, and terms of our contracts. We have had mixed success in negotiating favorable terms for new contracts. We have few ongoing or renewable contracts supporting core programs and services.</p>	<p>We are dissatisfied with the range, number, and terms of our contracts. We have been unable to successfully negotiate favorable terms for new contracts. We have no ongoing or renewable contracts supporting core programs and services.</p>							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## ix. Information Technology

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1
<b>Strong</b> ← <b>CAPACITY</b> → <b>Weak</b>									
<p>We have reliable in-house information technology (IT) support and are creative in our use of technology to support patient management, electronic health records (EHR), finance, communications, fund development, etc. We have a strong, vital web presence.</p>	<p>We have reliable IT support and use technology in a number of ways in our organization (i.e., finance, communications), but are still grappling with bringing patient management or EHR online. We have a solid web presence.</p>	<p>We have an outside vendor for IT support and have some down time in our systems. We have plans to implement patient management or EHR, but implementation has not yet begun. Our web presence is adequate at this time.</p>	<p>We have limited access to IT support, and have some difficulty ensuring that our systems meet our day-to-day needs. Our web presence is less than adequate.</p>	<p>We have very low capacity with respect to technology use and IT support; this puts our operations and services at risk. Our web presence is poor or lacking.</p>					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## x. Fund Development

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1
<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Strong</b></span> <span style="font-size: 2em;">←</span> <span style="flex-grow: 1; border-bottom: 2px solid #00a6c9; position: relative; margin: 0 10px;"> <span style="position: absolute; top: -5px; left: 50%; transform: translate(-50%, -50%); font-weight: bold;">CAPACITY</span> </span> <span style="font-size: 2em;">→</span> <span><b>Weak</b></span> </div>									
<p>We always raise the annual funds we need to operate our organization and provide needed services. We have excellent relationships with donors and funders.</p>	<p>We consistently raise the annual funds we need to operate our organization and provide needed services. We have strong relationships with donors and funders.</p>	<p>We somehow manage to raise what we need every year. We have good relationships with donors and funders.</p>	<p>We periodically struggle to raise the annual funds we need and our ability to meet our fund development goals is uneven. Our relationships with donors and funders need work.</p>	<p>We consistently struggle to raise the annual funds we need and often fall short of our fund development goals. Our relationships with donors and funders are deficient.</p>					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## xi. Marketing and Communications

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1
<b>Strong</b>		<b>CAPACITY</b>						<b>Weak</b>	
We have a very robust communications function that is able to target our messages to constituents in a way that supports service delivery, fund development, and our brand. We have good access to appropriate distribution channels to disseminate these messages to the public.	We have a good communications function that generates positive public relations for our organization. We have some access to good distribution channels to disseminate our message.	We are usually able to adequately communicate our message, with limited access to distribution channels for dissemination.	We are barely able to effectively communicate with constituents and don't reach those beyond an inner circle. We don't have access to distribution channels to disseminate our message.	We consistently fail to get an effective message out to constituents, and have little understanding of what distribution channels are available to help us disseminate our message.					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## XII. Reputation and Brand Recognition

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.



A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

### xiii. Influence

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

10	9	8	7	6	5	4	3	2	1		
<b>Strong</b> ← <b>CAPACITY</b> → <b>Weak</b>											
Our access to influential organizations, policymakers, the media, and community leaders is strong; we are often asked for our input when there's a critical issue or debate that involves the work of our organization.	We have good access to those who are able to help us further our work and mission, and are sometimes asked for input on matters involving the work of our organization.	We have some access to those who are able to help us further our work and mission, though we are only occasionally asked for input on matters involving the work of our organization.	We have little access to those who are able to help us further our work and mission, and are rarely, if ever, asked for input on matters involving the work of our organization.	We have no access to influential organizations, policymakers, the media, or community leaders; we are never asked for input on critical issues involving the work of our organization.							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

#### xiv. Facilities

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

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<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Strong</b></span> <span style="font-size: 2em;">←</span> <span style="flex-grow: 1; border-bottom: 2px solid #00a0a0; position: relative; margin: 0 10px;"> <span style="position: absolute; top: -5px; left: -5px; right: -5px; bottom: -5px; border: 1px solid #00a0a0;"></span> <span style="position: absolute; top: -5px; left: 50%; transform: translate(-50%, -50%); font-weight: bold;">CAPACITY</span> </span> <span style="font-size: 2em;">→</span> <span><b>Weak</b></span> </div>									
<p>We have ample space for our offices and medical services, sufficient to accommodate some growth; our facilities are situated in an ideal location and are very well maintained and equipped.</p>	<p>We have adequate space for our offices and medical services, but not enough to accommodate growth; our facilities are situated in a good location and are well maintained and equipped.</p>	<p>We have just enough space for our offices and medical services, which is becoming somewhat of a challenge; our facilities could be better located, maintained, and/or equipped.</p>	<p>We lack adequate space for our offices and medical services, compromising our ability to serve constituents; our facilities are not well located, consistently maintained, or adequately equipped.</p>	<p>We are working in space that is wholly inadequate to house our offices and medical services; our facilities are poorly located, maintained, and/or equipped.</p>					

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?

## xv. Purchasing

Where does your organization generally fall on the capacity continuum described below?

Enter number, from 10 (strong) to 1 (weak).

The following descriptions may not fit your organization exactly, but are offered as guidelines to spur your thinking. In your written answers, feel free to highlight elements from different boxes where more than one description applies to, or most closely approximates, your situation. Or offer your own descriptions indicating your current capacity in this overall area.

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Our purchasing systems are excellent. We have access to very competitive pricing for all our key purchases, such as administrative supplies and services, capital equipment, laboratory services, medical/surgical supplies, pharmaceutical products, technology, and telecommunications.	Our purchasing systems are good. We have access to competitive pricing for many of our key purchases.	Our purchasing systems are adequate. We have access to fair pricing for most of our key purchases.	Our purchasing systems need improvement. We have access to fair pricing for some of our key purchases, but feel we could be getting a better deal on others.	Our purchasing systems are poor. We are paying over market on key purchases, such as administrative supplies and services, capital equipment, laboratory services, medical/surgical supplies, pharmaceutical products and services, technology, and telecommunications.							

A. What are your key strengths or assets in this area? How might they be leveraged through strategic restructuring?

B. To what degree does/do the organization(s) with which you are considering partnering value or need your capacity in this area?

C. What are your challenges or deficiencies in this area? How might they be mitigated through strategic restructuring?

D. To what degree does/do the organization(s) with which you are considering partnering compensate for your shortcomings in this area?



## **xvi. Strengths and Challenges: Summary**

A. In which of the areas identified above (pages 2–16) is your organization most strong?

*Please list in priority order (strongest first).*

B. In which of the areas identified above (pages 2–16) is your organization most challenged?

*Please list in priority order (greatest challenge first).*

C. Which areas might you most want to strengthen through strategic restructuring? *Please list in priority order.*

## xvii. Compatibility with Potential Partner Organization(s)

The following questions are applicable if your organization is already in discussions (or negotiations) with one or more potential partners.

A. How much overlap is there between your mission and vision and those of your potential partner(s)?   
*(Use a 1–5 scale, where 1=not at all similar and 5=extremely similar.) Explain:*

B. How compatible are your values and culture with those of your potential partner(s)?   
*(Use a 1–5 scale, where 1=somewhat compatible and 5=extremely compatible.) Explain:*

C. How high is the level of trust between your organization and your potential partner(s)?   
*(Use a 1–5 scale, where 1=very low and 5=very high.) Explain:*

D. How would you rate your past experiences with your potential partner(s)?   
*(Use a 1–5 scale, where 1=somewhat negative and 5=very positive.) Explain:*

E. How similar are your programs and services to those of your potential partner(s)?   
*(Use a 1–5 scale, where 1=not at all similar and 5=extremely similar.) Explain:*

F. How much overlap is there in the types of clientele served by your organization and those served by your potential partner(s)?   
*(Use a 1–5 scale, where 1=not at all similar and 5=extremely similar.) Explain:*

G. How much geographic overlap is there between the area served by your organization and that served by your potential partner(s)?   
*(Use a 1–5 scale, where 1=not at all similar and 5=extremely similar.) Explain:*

### **xviii. Strategic Restructuring as a Proactive Strategy**

Considering how your organization’s strengths, assets, and challenges might be complementary to those of a potential partner is a critical first step when identifying and evaluating opportunities for strategic restructuring. Equally important is considering the potential of strategic restructuring for enabling you to respond proactively to changes in your environment, and to innovate, grow, and/or expand your impact. With that in mind, consider the following questions:

A. How might strategic restructuring support your organization’s ability to innovate?

B. How might strategic restructuring support your organization’s ability to respond to changes in your operating environment? Specifically, how might it help your organization more effectively prepare for — and respond to — health reform?

C. Are there other ways in which strategic restructuring might help your organization advance its strategy and/or increase its impact?

## **xix. Summary**

Overall, what do you believe is the most important thing you can achieve through strategic restructuring that you could not achieve on your own?

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### **ABOUT THE FOUNDATION**

The California HealthCare Foundation works as a catalyst to fulfill the promise of better health care for all Californians.

We support ideas and innovations that improve quality, increase efficiency, and lower the costs of care. For more information, visit us online at [www.chcf.org](http://www.chcf.org).