

## Generational Self-Assessment

If you want to measure your success as you bring generations into your planning, you need a starting point. This assessment will help you figure out where you're at now. You can revisit it annually to check progress.

This assessment is designed to get you thinking about where your organization is in relation to the effect generational change will have on your services, your staff, your volunteers, and your technology.

Unlike many assessments, this one is not scored. Rather, it is designed to get you started looking at the facts for your organization. There are many, many hands-on ideas throughout *Generations: The Challenge of a Lifetime for Your Nonprofit*, and discussion questions at the end of each chapter that will help you think through what you need to do. But the first job is to figure out where you are.

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Organization

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Date

## Part A: Internal Generational Status

In this section, fill in the numbers and percentages of people fitting into each generational group. Start with the raw numbers. The columns include both the generation name and the birth years for that generation. If you don't have actual data (particularly for service recipients), estimate as best as you can. Once you have entered the numbers and totaled them, divide each number by the total for that line. The result is the percentage. For example, if the employee total is 41, and the Gen@ number of employees is 8, the percentage is 8/41 or 19.5 percent. If you total your percentages, they should sum to 100 percent (plus or minus your rounding errors).

Note that in areas where you may have “part” of a person (as in the person is part time) you should still count that person as one. Let's say your official count shows you as having 10.5 FTEs (full-time equivalents), which includes 3 who work half-time. You would actually count 12 employees—9 full-time staff plus 3 part-time staff. Once you have done the entry and calculations for board, volunteers, and employees, compare that to the community. You can get your community data from the U.S. Census web site, [www.census.gov](http://www.census.gov). How do your percentages compare to those of your community?

		Gen@ 1981–2002	GenX 1963–1980	Boomers 1946–1962	Silent 1925–1945	Greatest 1901–1924	Total
Board	#						
	%						100%
Volunteers	#						
	%						100%
Employees	#						
	%						100%
Community	#						
	%						100%

## Part B: Generational Services Status

Now let's examine your services. The table below is set up the same as the one above, except that the left-hand column is blank: you need to fill in the services one by one. If you have more services than available rows, copy the table and fill out as many as you need. *Note:* To be

sure that you include it, I have filled in one row: individual donors. While donors are not necessarily service recipients, you need to take a look at them by generation as well.

Service Recipients by Generation							
Service area		Gen@ 1981–2002	GenX 1963–1980	Boomers 1946–1962	Silent 1925–1945	Greatest 1901–1924	Total
	#						
	%						100%
	#						
	%						100%
	#						
	%						100%
	#						
	%						100%
	#						
	%						100%
	#						
	%						100%
	#						
	%						100%
Donors	#						
	%						100%

### Service Recipients by Generation *(continued)*

Service area	Gen@ 1981–2002	GenX 1963–1980	Boomers 1946–1962	Silent 1925–1945	Greatest 1901–1924	Total
#						
%						100%
#						
%						100%
#						
%						100%
#						
%						100%
#						
%						100%
#						
%						100%
#						
%						100%
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%						100%
#						
%						100%