

# Organizational Assessment Checklist

If your health department is at the very beginning stage of proposing a policy for equitable community compensation (ECC), it's important to engage in an organizational assessment to get a clear picture of what may be some existing practices, who in the organization may need to play a role in the process, and how an ECC policy can fit well into existing policies and practices at your agency. Conducting an organizational assessment will also allow you to make a stronger case for the policy and open the doors to conversation among key players at your agency.

The checklist below is adapted from the Urban Institute's organizational assessment for community compensation.

- ✓ Work with colleagues in your agency (Health Department, Finance and Administration, Grants Management, and other relevant departments) to understand how community compensation has been practiced in the past, if at all. What program or activities were people compensated for? What community compensation practices have existed in your agency in previous years? Examples: Distribution of gift cards for surveys or focus groups, payment to community members or civic groups for their input, feedback, or partnership on a program?

- ✓ Identify who at your agency will need to be involved in community compensation (offices, operating structures, and personnel). This information can often be found through understanding town/city, regional, or state-level vendor engagement practices. These individuals will often include administration, finance, grants management/writers, and so on. Also understand and note what reporting requirements for community compensation may exist in your agency.



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- ✓ When engaging with various departments and personnel to understand existing practices of compensation, ask about logistical and historical justifications around practices. What logistical hurdles have been encountered in the past? Are there restrictions on forms of compensation? What forms of compensation are possible through your agency (checks, gift cards, re-fillable pre-paid debit cards, etc.)? You can review our list of forms of compensation and the pros and cons of each, [\[linked here\]](#).

- ✓ Understand tax and benefit implications of providing compensation to community members. Review our resource on forms of compensation [\[link here\]](#) to understand the potential paperwork associated with different forms of payment, review the Institute for Research on Poverty's Summary of Benefit Cliffs and Marginal Tax Rates [\[link here\]](#). Local, state, and federal benefits may be impacted. Make note of any findings or considerations below.

