NZ NAVIGATOR

Registration Guide

Let me guide your organisation on its developmental journey

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Part One -
Introduction

About this guide

This guide provides all the information needed to ensure that you are able to successfully register, set-up your account and log into NZ Navigator. A complete User Guide (including information about completing assessments and working with the results of your assessment) is available to organisations that have registered.

Developed for New Zealand organisations

The tool has been developed for New Zealand community organisations by a community development initiative based on partnership. It is community owned, managed and governed by the NZ Navigator Trust.

The tool is not linked to any contract funding for participating organisations. Anonymised data is used by the NZ Navigator Trust for local, regional and national planning and community development purposes.

NZ Navigator supports and promotes the development of:

- More effective and efficient organisations

- Better quality services for users

- Better communication among staff, trustees and volunteers

- Increased staff buy-in and motivation

- Greater credibility and legitimacy with funders

- Creative, learning-orientated organisations

- New perspectives and innovative ways of working

- A process of continuous quality improvement

What is NZ Navigator?

NZ Navigator is an online self-assessment tool that helps community organisations to identify their strengths and weaknesses across a number of core functions.

The tool is designed to help enable strong and sustainable organisations and communities. Users can undertake single user assessments, multiple participant assessments or branch assessments to assess and rate the performance of their organisation in the following key areas: direction, governance, leadership, people, administration, finances, communication, evaluation and relationships.

One person registers for your organisation. The registered user sets up the organisation's profile details and can either complete a single assessment for the organisation or create assessments for other people to participate in.

Who is involved?

NZ Navigator is managed by the NZ Navigator Trust.

The tool was originally developed by a community partnership between Platform Trust and The Bishop's Action Foundation, supported by the Department of Internal Affairs.

The software developer for NZ Navigator is Rabid Technologies Limited.

NZ Navigator directly draws resource links from another website managed by the NZ Navigator Trust, CommunityNet Aotearoa – an online hub where you can find and share resources designed to strengthen community organisations. CommunityNet Aotearoa aims to help community organisations by:

- Providing access to relevant, good quality information
- Raising the profile of the community sector
- Encouraging information-sharing between organisations

Is this tool relevant for every community organisation?

The tool is designed to be used by all small-to-medium sized community organisations, of all levels of complexity. There is no expectation that every community organisation should score at the highest level in every area - as some aspects of organisational performance will be more relevant to particular organisations than others. It is expected, though, that the 'viability' level should be attainable by every organisation, irrespective of its size or complexity.

What are the benefits?

Once your first assessment has been completed, you will be able to access targeted resources to assist in further developing your organisation. Although not linked to any funding requirements, organisational representatives can use the results of the tool when they meet with funders, to demonstrate the work undertaken, and to highlight areas where further organisational development activity could be supported.

The tool provides your organisation with a benchmark for future evaluation.
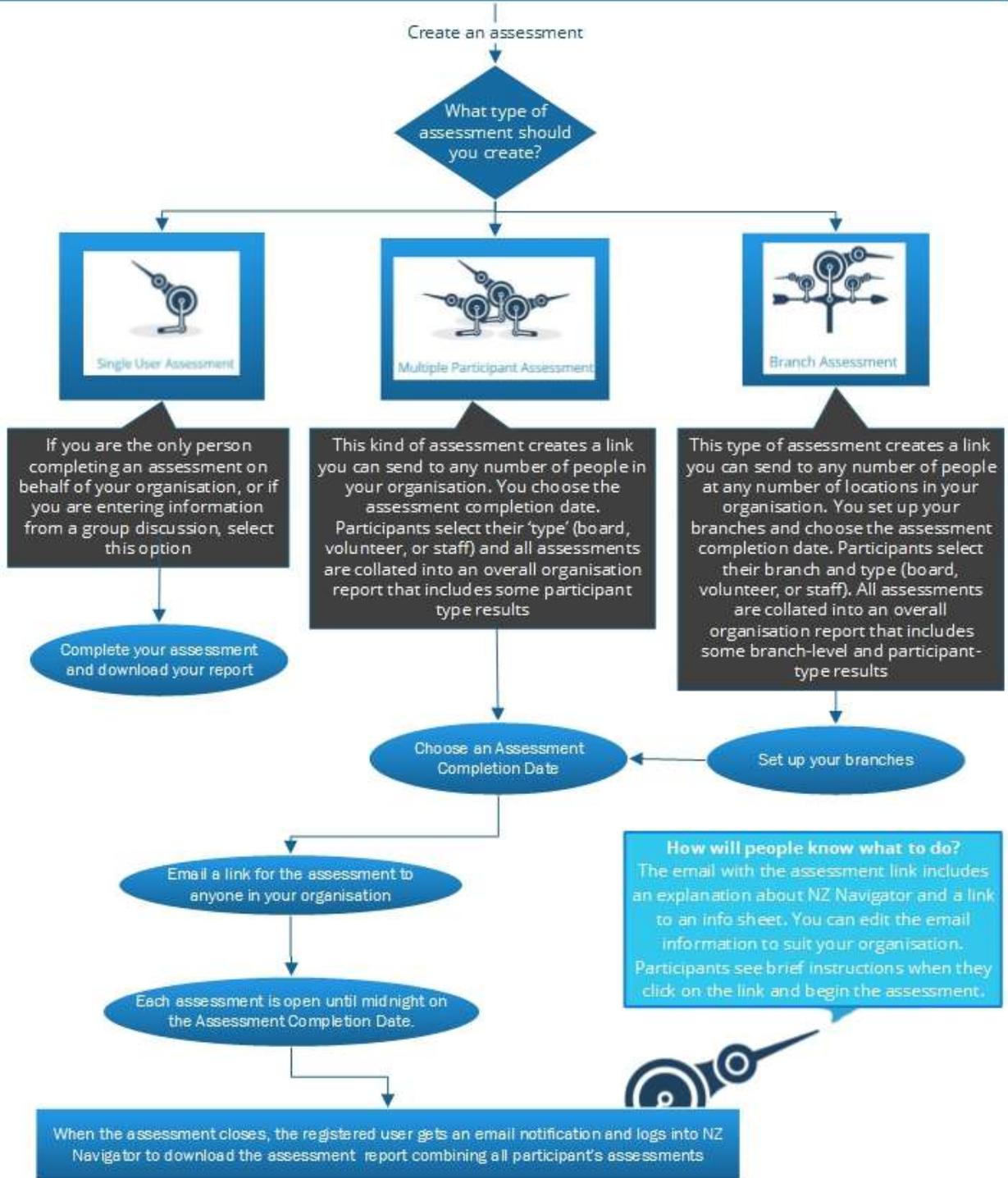
Who gets to see the information?

Because the tool is self-administered, it provides community organisations with an opportunity to be open and honest about key aspects of their organisation. No other agency, including the partners to the NZ Navigator initiative, can identify and view any individual organisation's information.

The assessment database will be used to produce some aggregated information (anonymised) that will provide a high-level picture of how community organisations in New Zealand are changing over time.

NZ Navigator Self-Assessment Tool Overview

How does this work?
One person registers, sets up the organisation profile then generates the assessments to send to other people in the organisation

One user registers for the organisation

Create an assessment

What type of assessment should you create?

Single User Assessment

Multiple Participant Assessment

Branch Assessment

If you are the only person completing an assessment on behalf of your organisation, or if you are entering information from a group discussion, select this option

This kind of assessment creates a link you can send to any number of people in your organisation. You choose the assessment completion date. Participants select their 'type' (board, volunteer, or staff) and all assessments are collated into an overall organisation report that includes some participant type results

This type of assessment creates a link you can send to any number of people at any number of locations in your organisation. You set up your branches and choose the assessment completion date. Participants select their branch and type (board, volunteer, or staff). All assessments are collated into an overall organisation report that includes some branch-level and participant-type results

Complete your assessment and download your report

Choose an Assessment Completion Date

Set up your branches

How will people know what to do?
The email with the assessment link includes an explanation about NZ Navigator and a link to an info sheet. You can edit the email information to suit your organisation. Participants see brief instructions when they click on the link and begin the assessment.

Email a link for the assessment to anyone in your organisation

Each assessment is open until midnight on the Assessment Completion Date.

When the assessment closes, the registered NZ user gets an email notification and logs into NZ Navigator to download the assessment report combining all participant's assessments

Sneak Preview

If you would like a closer look at the tool before you register, there are two options:

🗝 A <u>video</u> that gives a brief overview of NZ Navigator

🗝 A sandpit or demo that lets you experience NZ Navigator before you sign up. The demo is available on the NZ Navigator <u>website</u>.

What you get from NZ Navigator

Customised Reports of your results

When your organisation completes each on-line self-assessment, a customised report is created. You can view this assessment report on-line (login to NZ Navigator and go to **'View Assessments'**) and you can download a PDF copy of it at any time.

These reports includes :

- a spider graph depicting your scores for the each of the essential organisational elements/domains

- a tailored report card (including descriptions of best practice for each domain)

- some hot tips, including useful links and proven resources for organisational development purposes

- action plan guidance to help you develop your improvement plan and

- some additional analysis for multiple participant assessments and branch assessments.

All the assessments you want

Your assessment can be undertaken in a time-frame that suits your organisation. You can save it and return to it at any time, but it must be fully completed (all of the Domains) to access a report for this particular assessment. Multiple recipient and branch assessment reports are available after the assessment completion date is reached.

You can repeat the assessment process at any time in the future. This is a great way to look at the impact of the changes you have made and the effectiveness of any programmes you have implemented.

When you complete your second, or subsequent, assessments you will be able to generate comparative reports to track improvements and monitor changes.

A reminder from us

We will send you a gentle reminder by email twelve months after each assessment is completed to prompt your organisation to repeat the NZ Navigator self-assessment.

Once you've completed the tool...

Once the tool is completed, your assessment report includes some resources to assist you to further develop your organisation. You can also use the results of the tool when you talk with your funders, to demonstrate the work that you are doing and those areas where some organisational development activity can be supported.

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Privacy of information you provide

We ensure security by keeping data safe from unauthorised access and use, and guarantee confidentiality by never releasing information that can identify individuals or organisations.

An individual organisation's information will never be released to a third party.

The process of NZ Navigator registration creates a unique ID for your organisation. This ID protects the identity of each organisation and means that you can complete further assessments and then compare these new assessments to your previous assessments.

Multiple participant and branch assessments are completed by individual people within your organisation. Responses from individuals (including email addresses) are not made available to your organisation's registered user. Although you will see a count of completed assessments, the results from each assessment are aggregated into a combined report.

Anonymous Information

Aggregated information is used by the Community Partners to develop a broad profile of community organisations at a local, regional and national level for planning and community development purposes.

We use the characteristics of your organisation (ie, size, type and geographical coverage) that you supply when you register with NZ Navigator to help generate meaningful groupings of organisations for statistical purposes.

(Read more about our privacy policy here)

Part Two -
Getting started

Getting Started

This section explains how to create a NZ Navigator account and how to log in to use the Tool.

Create a NZ Navigator account and log in:

set up your account in NZ Navigator and log in to access additional information.

> **One person registers for each organisation**.
> The registered user sets up the organisation's profile details and can either complete a single user assessment for the organisation or create assessments for other people to participate in.

Registration

In order to use the NZ Navigator tool, all organisations are required to register by creating an account. This organisational account user can also set up assessments for other people in the organisation to participate in. NZ Navigator assumes that the person who creates the account on behalf of the organisation is authorised to do so.

During the process of registration, you will supply an e-mail address which then becomes your username each time you access the tool. The organisation will be sent a reminder email to this email address twelve months after each assessment is completed to prompt your organisation to repeat the self-assessment.

> As this reminder is an automated process, we'd suggest that you use a generic email address if possible (eg, info@myorganisation.org.nz) rather than using a personalised email address for a named individual.

The process of registration creates a unique ID for your organisation. This ID protects the identity of each organisation and means that you can complete further assessments and then compare these new assessments to your previous assessments.
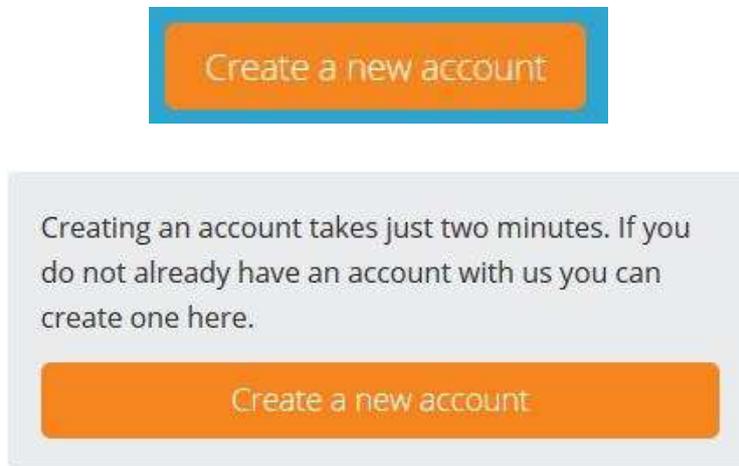
Creating an Account

NZ Navigator offer several options for creating an account:

🔑 Use the **'Create a new account'** option at the top right of the NZ Navigator home page:

Log in   Create a new account
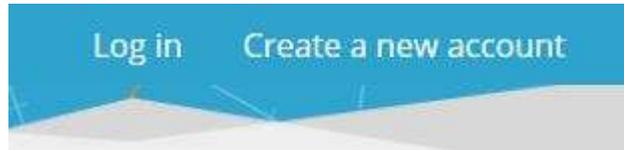
🔑 Or use one of the orange **'Create a new account'** buttons:

Create a new account

Creating an account takes just two minutes. If you do not already have an account with us you can create one here.

Create a new account

Activating your account

Your new account needs to be activated and you will be sent an email message to the address used to create your account.

A message with a confirmation link has been sent to your email address. Please open the link to activate your account.

Open the NZ Navigator **Confirmation Instructions email** and click on **'Confirm my account'**:

You can confirm your account email through the link below:

Confirm my account

If you do not receive your registration confirmation instructions by email, click on **'Didn't receive confirmation instructions'** on the log in page**,** enter the email address you used to create your account and then click on **'Resend confirmation instructions'**.

Resend confirmation instructions

Email

Resend confirmation instructions

If you still have problems with your registration after you have followed these steps, email the tool administrator at info@nznavigator.org.nz for assistance.

Setting up your account profile

There is a **one-time-only process of setting up the profile of your organisation**. Questions with an asterisk (*) are required.

The core information is on three tabbed pages and you can move between them by clicking on the heading tabs - **basic info**, **primary activities** and **service locations** or using the *'Next'* button at the bottom of each page.

Next

You can come back and change these details at any time after you have created your account - login then click on **'User settings'** then on **'Edit account'** in the drop down menu:

Dashboard   Create Assessment   View Assessments   User Settings ˅   Log out

Edit account
Edit branches

If your organisation has a branch structure (eg, branches in Auckland, Hamilton, Hawkes Bay and Christchurch), you can set up your branch details on the '**Manage Your Branches'** page. There is a link to this on the account profile (visible once your account has been confirmed)...

Edit User   Edit Branches

Basic info   Primary activities   Service locations
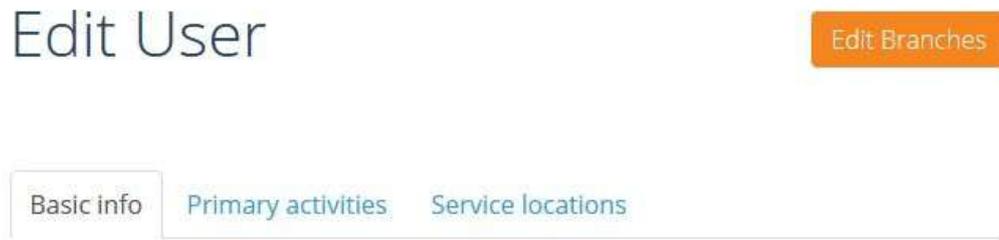
...or you can use the drop down on '**User Settings**' on the navigation bar,

User Settings
Edit account
Edit branches
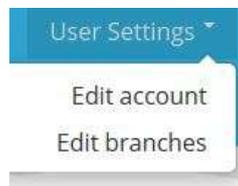
Read more about setting up branches here.

Account Profile - Basic Information

Enter information **about you** and **about your organisation** on the **'Basic info'** tab:

Edit User   Edit Branches

Basic info | Primary activities   Service locations

About you

Questions with an asterisk are required.

* Your full name

e.g. Janet Doe

* Your first name

Use the name you prefer to be addressed as e.g. Jane

* Your email address

Email confirmation

only required if email changed

Password

leave it blank if you don't want to change it

Password confirmation

About your organisation

* Organisation name

* Phone number

* Postal address

* Post code

* Number of paid staff

0

* Number of volunteer staff

0

* Development stage

⊙ new

⊙ emerging

◉ growing

⊙ developed

Next

Account Profile - Primary Activities

What is your organisation's primary activity?

Enter information **about what your organisation does** on the **'Primary activities'** tab.

Your organisation may be involved in more than one of the activity areas listed but you will need to choose one **primary activity**.

Most of the eleven activity areas have either an **'other'** option, or **'support and ancillary services'.** Use these options if your organisation's work is in the broad activity area but there isn't a specific option covering what your organisation does.

Choosing one primary or main activity means we will be able to provide you with reports and other targeted information. Benchmarked graphs will be added to the NZ Navigator report soon and these will compare your progress to other organisations who have selected the same primary activity category.

By choosing the most appropriate main activity for your organisation, you will make these comparative graphs as useful as possible.

About what you do

Select the category that best describes your organisation's main activity.

Business and professional associations, unions

Culture, sports and recreation

Development and housing

Education and research

Environment

Grant making, fundraising and voluntarism promotion

Health

International

Law, advocacy and politics

Not elsewhere classified

Religion

Social services

Click on an activity area to display each activity area's sub-activities and click in the circle at the left of the sub-activity to select it:
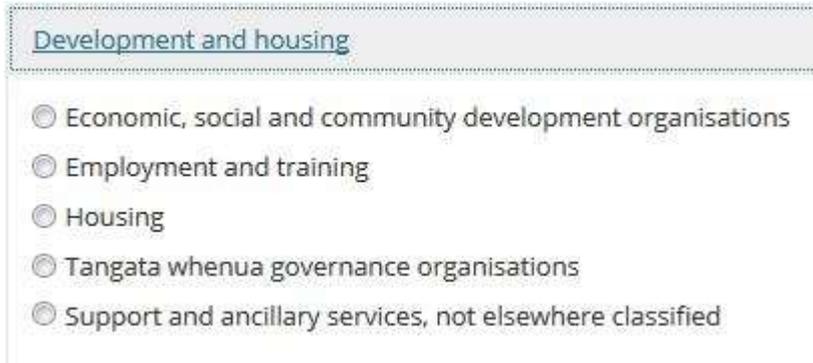
ABOUT THE PRIMARY ACTIVITY CLASSIFICATION:
The NZ Navigator Primary Activity Classifications are based on the Statistics NZ New Zealand Standard Classification of Non-Profit Organisations (NZSCNPO) which was used by the Johns Hopkins University Comparative Non-profit Sector Project framework. This classification structure was chosen for the purpose of standardisation and to enable comparison to other national data produced in New Zealand.

Account Profile - Service Locations

Where do you provide services?

You can choose:

- a single district or several districts
- select all the districts in a region (by clicking **'Select All'** next to the region name)
- select all North Island or South Island districts or
- select all districts in all regions if you are a national provider

If you select something in error, click in the check box or on the button again to de-select the option.

If you are registering for only part of a larger organisation, choose the districts in which **your** part of the organisation provides services.

ABOUT THE SERVICE LOCATION CLASSIFICATION:
The NZ Navigator Service Locations are the Territorial Authority NZ Classifications (which provide links to Regions and Regional Councils). This classification structure was also chosen for the purpose of standardisation and to enable comparison to other national data produced in New Zealand.

Missing information?

A number of the profile details are 'required' - these are marked with a *****.

If you miss any of these details, you will get error messages that are highlighted in red and look like this:

Create a new account

Please review the problems below:

Organisation primary activity can't be blank

Organisation locations An organisation must have at least one location

You will need to correct any missing information to complete your account profile.

Confirm the changes

Enter your account password to confirm and update the changes to your account:

* Current password

we need your current password to confirm your changes

Update account

If your organisation has a **branch structure** read more here...

Creating and Managing your branches

If your organisation has a branch structure (eg, branches in Auckland, Hamilton, Hawkes Bay and Christchurch) and you want to do Branch assessments, set up your branch details on the '**Manage Your Branches**' page. There are several ways to get to this page.

You can use the navigation bar at the top, and click on '**User Settings**' then '**Edit branches**'.
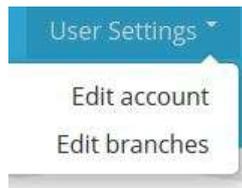
There is also a link to this page on the '**Edit User'** profile page:

Or when you are in the process of creating a branch assessment and need to edit your branches, click on the '**Manage Branches**' button:'

To add a new branch, enter a title or **name** for your branch. This can be anything you want:

* Branch name

Choose the **location** of the branch from the drop down list:

* Location

Select an Option ▼

The regions shown in the location drop down list are based on your user profile details. These are the areas that you provide service in and branch locations must match these.

If you have a branch in a location that is not included in the location drop down list, click on this link to update your information in your profile:

Click here to manage your organisation's service regions

ABOUT THE BRANCH LOCATION CLASSIFICATION:
The NZ Navigator Branch Locations are the Territorial Authority NZ Classifications Regions. This classification structure was chosen for the purpose of standardisation and to enable comparison to other national data produced in New Zealand.

Once you have entered these details, click on the '**Create Branch**' button:

Create Branch

Editing and Deleting Branches

If you have previously set up branches for your organisation and there have been changes, you can **edit** or **delete** existing branch records using the buttons on the '**Manage Your Branches**' page.
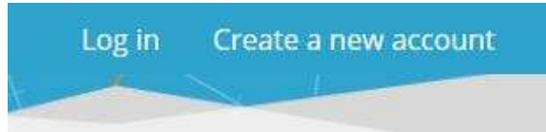
Manage Your Branches

Create A Branch Assessment

Northern	Auckland	Edit	Delete
Eastern Bay of Plenty	Bay of Plenty	Edit	Delete
West Auckland	Auckland	Edit	Delete
Palmerston North	Manawatu-Wanganui	Edit	Delete

Please note: if you delete branches that you have previously included in assessments, these branches will still appear in those previous assessment reports or any assessment comparison reports including those particular assessments. Any change you make to the branch name will be shown as the current branch name in all reports.
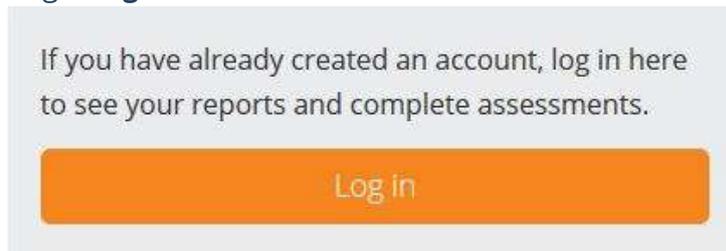
Logging In

There are several ways to access the NZ Navigator log in page:

Use the *'Log in'* option at the top right of the NZ Navigator home page:

Or use the orange *'Log in'* button:

Enter the **email address** and **password** you used to create your NZ Navigator account and click on the *'Log in'* button:

Below the log in button are options you can use if you need to **create a new account** or you have **forgotten your password**.

Account Set Up and Logged In

Once you have set up your account, logging in takes you to your own **Dashboard** page. The dashboard gives you access to all the NZ Navigator functions - creating new assessments, viewing existing assessments, help etc. This is what it looks like:
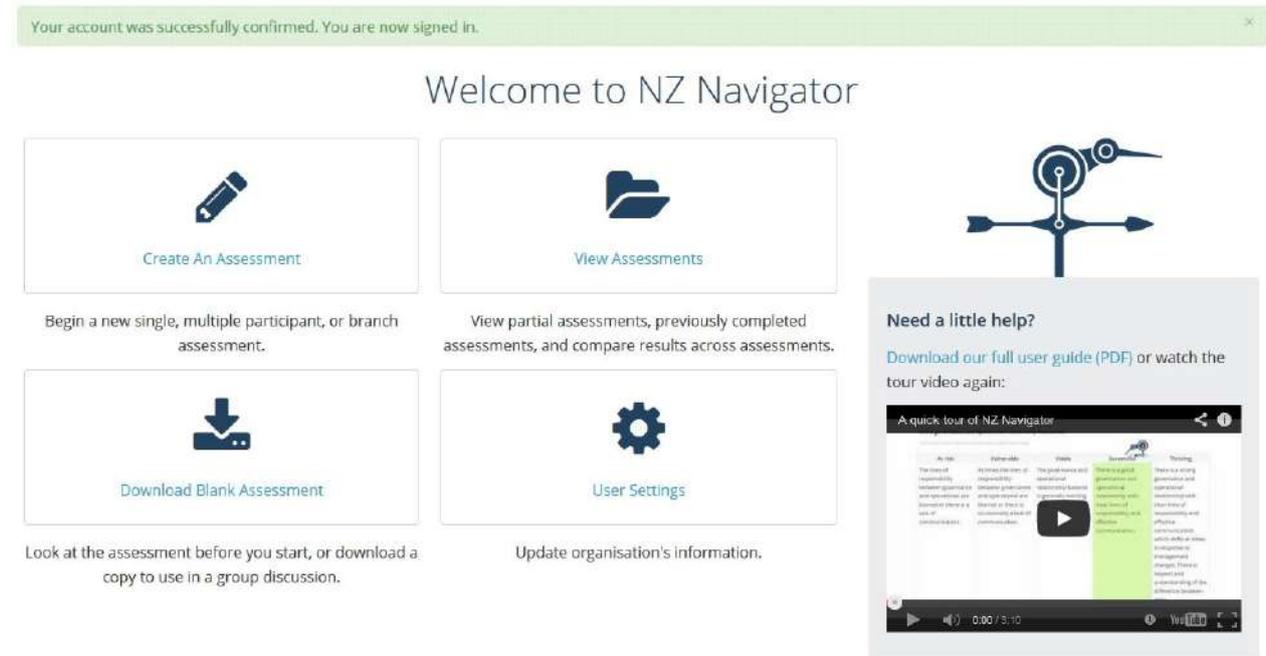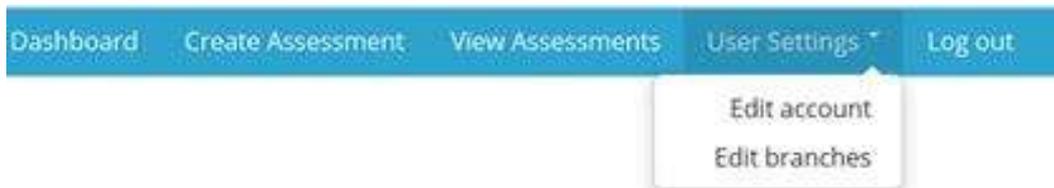

You can return to your dashboard at any time by clicking on '**Dashboard**' on the navigation bar:

Updating your Account

You can use the navigation links at the top right of the page at any time (as long as you are logged in). Click on **'User Settings'** to update your account details then '**Edit account'.**

Logging Out

Use the **'Log out'** button at the top right to leave your NZ Navigator session.

Preparing your organisation

This section covers the steps most organisations will take when getting ready to use the tool. These include:

Getting ready:

decide on the <u>approach</u> your organisation should use to collect and analyse the

data, who to involve, how and when.

Gathering the data:

<u>gathering the information</u> you will need to complete an assessment.

Before you start

To get the most out of NZ Navigator, it is vital that there is buy-in to the process, particularly at a senior level.

Everyone involved needs to be clear about why the organisation is doing it, understands what will happen once the data has been gathered, and are willing to act on the findings to improve the organisation.

It is important that discussions on these issues take place before starting NZ Navigator.

Ensuring a robust self assessment process

The NZ Navigator Tool requires your organisation to be self-reflective and open about its strengths and weaknesses. To ensure an accurate picture, it is important that those engaging in the process are specific about why they think the organisation is at a certain level.

It's important that you gather a wide-range of perspectives during data collection if you can, however the degree to which you will be able to do this will often depend on the size of your organisation. More input will help create an objective and balanced picture of your organisation's strengths and weaknesses.

Involving different stakeholders in the assessment process, analysing the results and developing your improvement plan can also help develop ownership and increase the likelihood of staff implementing the improvement plan.

Things to think about

Who do you want to be involved in the assessment process? How representative do you want these people to be of the organisation?

> **APPROACH:** Identify who needs to be involved in the process, how representative they should be of the organisation, and how in-depth and detailed you want the process to be (eg, a small, self-selected group like the senior management team; a group of staff representing different perspectives within the organisation; an all staff workshop/discussion); or a multiple participant or branch assessment (individual's complete their own assessments which are combined into a whole-of-organisation report).

What is the best time for the organisation to do an NZ Navigator assessment?

> **TIMING:** Identify the best time to undertake the information gathering stage of the self-assessment (eg, as part of regular strategic planning; when planning organisational or operational change; to support a funding proposal; to ensure compliance with standards)

Does everyone involved in the assessment understand what it is, why you are doing it and what you hope to get out of it?

> **BUY-IN:** Build commitment and ownership among colleagues/ stakeholders: Make sure everyone involved understands what the NZ Navigator self-assessment tool is, why the organisation is doing it and what the organisation hopes to get out of it.

Gathering Data

There are a number of ways that you can gather the data you need to undertake an assessment. You choose the method that suits your organisation:

🔑 you can start the online assessment straight away, either working alone or with others, or by creating and distributing multiple participant assessments

✏️

Create An Assessment

Begin a new single, multiple participant, or branch assessment.

🔑 *or* you can download a **blank assessment form** from your Dashboard page to use for information gathering and discussion with others in your organisation.

⬇️

Download Blank Assessment

Look at the assessment before you start, or download a copy to use in a group discussion.

NZ Navigator Registration Guide

Troubleshooting and help

Documentation

There are five documents with information designed to help you with your NZ Navigator journey:

- Terms of use
- Glossary
- FAQs
- Privacy policy
- User guide

These documents can be accessed through the links at the bottom right of each page on the site:

Terms of use | Glossary | FAQs | Privacy policy

Login problems

The Login page has several 'help' features - below the **log in** button are options you can use if you need to **create a new account**, have **forgotten your password** or **not received your confirmation email**.

Create a new account
Forgot your password?
Didn't receive confirmation instructions?

If you still have problems with your login, see the following sections - **Change of registered user** and **Change of email address.**

Change of registered user details

In the earlier section **Creating an account**, we suggest that you use a generic email address for your organisation's NZ Navigator account if possible (eg, info@myorganisation.org.nz) rather than using a personalised email address for a named individual.

We suggest this because we use an email address for the login and contacting your organisation, plus your organisation's assessments are connected specifically to that user account.

> Problems can arise if the person who set up your organisation's NZ Navigator account leaves the organisation and the personalised email they used for registration is no longer active.

You can of course create a completely new user account for your organisation with your new details, *however*, **you will not be able to access previous assessment reports or compare details between a previous assessment created with the old account details and any new assessments** you create with your new user account.

> **PLEASE NOTE:**
> NZ Navigator assessments are not transferable between different user accounts so please make sure that you register with an email address that will work for your organisation over many years.

Change of email address

There are three ways to update a previous registration email address for your organisation:

1. You know the email address and the password

If you have the previously registered user's email address and password, log in to NZ Navigator normally, go to **Edit account** then the **About you** tab and and update the name, email and password information.

Edit account

About you

Questions with an asterisk are required.

* Your full name   An organisation

e.g. Janet Doe

* Your first name   Jane

Use the name you prefer to be addressed as e.g. Jane

* Your email address   jane@anorganisation.org.nz

Password

leave it blank if you don't want to change it

Password confirmation

2. You know the email address and have access to it but not the password

If you have access to the original registered account email address mailbox but do not know the password, you can go to the NZ Navigator login, enter the original email address, choose **Forgot your password?** to generate a new password that will be emailed to the registered email address.

Log in

If your organisation already has an account with us you can log in here. If you do not have an account yet you must create an account first.

Email

Password

☐ Remember me

Log in

Create a new account
Forgot your password?
Didn't receive confirmation instructions?

Once you have the replacement password, log in and update the account details as described above.

3. You can't access the mailbox and don't know the login

If all else fails, you can contact us by email at info@nznavigator.org.nz if you need assistance with changing your organisation's registered user.

Our administrator can reset the email address and you can then update the profile details yourself. We suggest again that where possible you use an organisational email address (eg, somethinginfo@myorganisation.org.nz) for this purpose.