Organisational Assessment

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OVERVIEW

Your organization works toward the betterment of the deaf community by advocating for, achieving, and defending your members' human rights.

Organizations are made up of diverse groups of individuals who work together toward shared goals and whose members may have very varying personalities, education, life experiences, training and different styles of work and socialization.

Men and women may see issues differently. Older members who have run the organization for years may have different perspectives than the youth.

Together, the diverse members in organizations work to shape the changing world around them for the better and at the same time must adapt and work with different perspectives in their organization to make an impact on their world. They try to make their organizations stronger and perform better and sometimes just trying to keep it alive.

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ORGANISATIONAL ASSESSMENT

Deaf association wants to perform its best to achieve goals: Improve lives of deaf people

Deaf association assesses strenghts and challenges

Collects data to show what needs to be improved

Invites key stakeholders to participate in assessment

Deaf association has deeper understanding of how to improve structure and practices

Deaf association improves planning, communication and action plan

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THE ASSESSMENT

- Your organization wants to perform at its best to achieve its goals to improve the lives of deaf people, their families and community

- To do so, it makes sense to assess the strengths and **challenges** of your organization through collecting data that can show you what needs to change to improve

- The assessment will take some time and will need to have the participation of key stakeholders throughout your organization, but you will have a deeper understanding of how to improve the structure and practices that can help improve planning, communication, and action to strengthen

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WHY MAKE A SELF-ASSESSMENT OF ORGANISATION

- **Going through a transition**
  - Example: Change in new board members or staff
- **Need to make decision about the organisation**
  - Example: Determining if the goals are still important to the current community or to learn if they are performing as best, they could
- **Is the organisation perfoming its best?**
- **Strategic planning**
- **Identify a problem**
  - Example: An organization's projects are successful but new donors do not seem interested in the positive impact. Perhaps people do not come to the organization's open meetings or activities
- **Resolve an issue**

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OTHER REASONS TO MAKE SELF-ASSESSMENT

Strategic decisions
- Is your organisation ready to grow?
- Should you change your mission or goals?

Decisions about programs / projects
- Should your deafblind program expand?
- Should new health services for LGBTQ+ deaf people be offered?

Financial decisions
- Should you look for different funding?
- Should you collaborate with other organisation to find funding together?
- Do you need to close one program/project and put money into another program?

Staff
- Do you need people with different skills to support the mission?
- Are some staff unneeded?

Identify strengths and weaknesses
- So you can improve your organisation

Identify issues and challenges
- Resolve them before they become worse

Find facts and information for funds and stakeholders

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ASSESSMENT METHODS

Assessment made completely by people from your organisation

Assessment made by people from your organisation and outside your organisation

Assessment led by an external organisation/consultant but with substantial input from people in your organisation

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FULL ORGANIZATIONAL OVERVIEW FOR *IMPROVEMENT*

An organization might want to do a self-assessment when they are going through a transition, such as a change in board members or administrators.

An organization might want to do a self-assessment when it needs to make decisions about the organization itself, such as determining if the goals are still important to the current community or to learn if they are performing as best, they could.

The information gathered during a self-assessment helps when doing strategic planning, too.

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Overview of your organisation → Full assessment → Identify issues for strategic planning

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PARTIAL ASSESSMENT TO IDENTIFYING A PROBLEM OR RESOLVING AN ISSUE

An organization might notice challenges they are facing and decide to look at the parts of their organization that are affected.

For example, an organization's projects are successful but new donors do not seem interested in the positive impact.

Perhaps people do not come to the organization's open meetings or activities.

Instead of doing an assessment of the full organization, a self-assessment could focus on how results are communicated to the donors to excite them or how meetings or activities could be more appealing to people.

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EXAMPLE: BETTER ORGANISATIONAL PERFORMANCE

Deaf association already did evaluation of programs and projects, but never assessed how the organisation performed

Self-assessment of strengths and weaknesses of how the organisation performed

WHY?

• New president – information would help to lead better

• Deaf community have many new members with additional disabilities and the association wanted to make sure that they were meeting the needs

• Expenses were growing, need to understand their strengths to attract new funds

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Resolve organisational problem → Assessment of the problem → Identify solution or issues for strategic planning

Low attendance at events → People not interested in topics → Interview people to find out what events they want

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PARTIAL ASSESSMENT TO IDENTIFY PROBLEM OR RESOLVE ISSUE

Deaf association notices challenges: Projects are successful but new donors are not interested in the positive impact

Instead of doing a full assessment of full organisation, partial self-assessment focuses on how results are communicated to donors

Deaf association notices that they have not been active on social media and it is not clear how deaf association has contributed to positive changes

After changing their communication strategy and making clear results from positive impacts, deaf association now can show results to new donors

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Deaf association identifies a challenge → Deaf association decides to look at the parts of the organisation that are affected

Example 1: Projects are successful but new donors are not interested in the positive impact
→ Self-assessment focusing on how results are communicated to the donors, or excite them

Example 2: People do not come to open meetings or activities
→ Self-assessment focusing on how meetings or activities could be more appealing to people

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EXAMPLE: FUNDING CUT

Deaf association expected funding from NGO

NGO had internal financial problems and could not give money

CLOSE ASSOCIATION
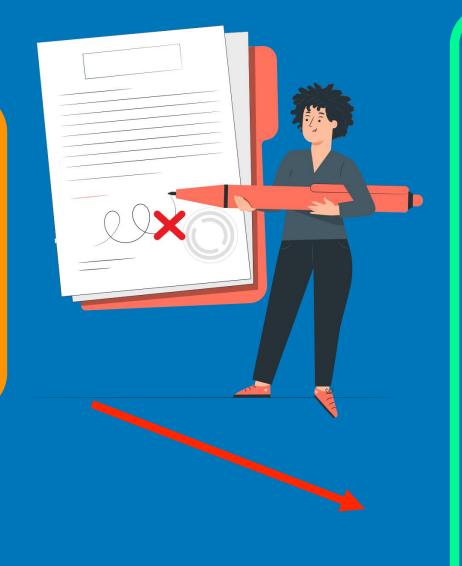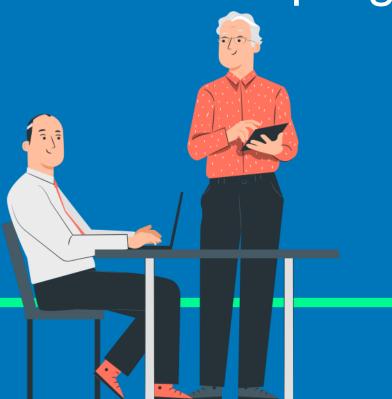
LET SOME STAF GO?

CLOSE A PROGAM?

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EXAMPLE: FUNDING CUT

Self-assessment:
Look different options

Decision: Stay open with smaller staff and one less program

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EXERCISE 1

Identify the reasons why your organization should do a self-assessment

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WHEN ARE YOU READY FOR SELF-ASSESSMENT?

- Cultural readiness
- Leadership readiness
- Ressource readiness
- Vision and strategy readiness
- People readiness
- Systemic readiness

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FACTORS THAT CAN AFFECT READINESS

Must have

- Leaders support the self-assessment
- Someone who will make the assessment, no matter how difficult
- Enough internal resources
- A good reason

Not necessarily, but nice to have

- Your organisation has had a positive self-assessment in the past
- No major activities or changes at the same time
- Resources (financial) in budget
- People trust the leaders
- A clear understanding where the organisaton wants to go

Difficult to make assessment

- Self-assessment that have failed
- Unclear idea why make self-assessment
- People do not have skills or capability to do a quality self-assessment
- People do not agree with doing the assessment or are afraid to do it

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EXERCISE 2

Identify your organization's factor for readiness of a self-assessment

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PREPARING FOR SELF-ASSESSMENT

1. Decide who will use the results of self-assessment
2. Identify your stakeholders
3. Create your team
4. Plan your self-assessment

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STEP 1: DECIDE WHO WILL USE RESULTS OF SELF-ASSESSMENT

Decide who will read and benefit from reading the final results

Inside the organisation (administration, staff, board)
- Improve decisions about roles and responsibilities
- Strategic management
- Organisational change

Outside the organisation (by funders)
- Helps your organisation to learn how perform better and make appropriate changes (example of reason: We funders support participation in decision-making by all stakeholders and we want to see that is happening)
- Understanding how their investment in your organisation is achieving goals or not (we gave you donation to do a job training for 40 deaf women. Did you achieve your objectives?)
- Your organisation understands better your relationship with the funder (the funder gives us money twice a year, but we would feel more confident and able to plan better if the money comes quarterly)

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STEP 2: IDENTIFY STAKEHOLDERS

Stakeholders are the groups or individuals that will be affected by the results of the assessment.

For example, an organization's self-assessment shows membership is now 72% of people under that age of 35 years old and you learn the current events and programs are "uninteresting to the youth".

Because of the assessment, administrators, staff, members, the youth, deaf and hearing communities and perhaps others will work to create events and programs to address their needs.

These groups are the "stakeholders". Therefore, the stakeholders should be involved with the self-assessment.

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EXERCISE 3: IDENTIFY THE STAKEHOLDERS

STEP 3: CREATE YOUR TEAM

- Strategically prepare the guidelines and directions for the assessment
- Monitor the process
- Data collection (surveys, interviews, group discussion)
- Two teams: Strategic and operational team

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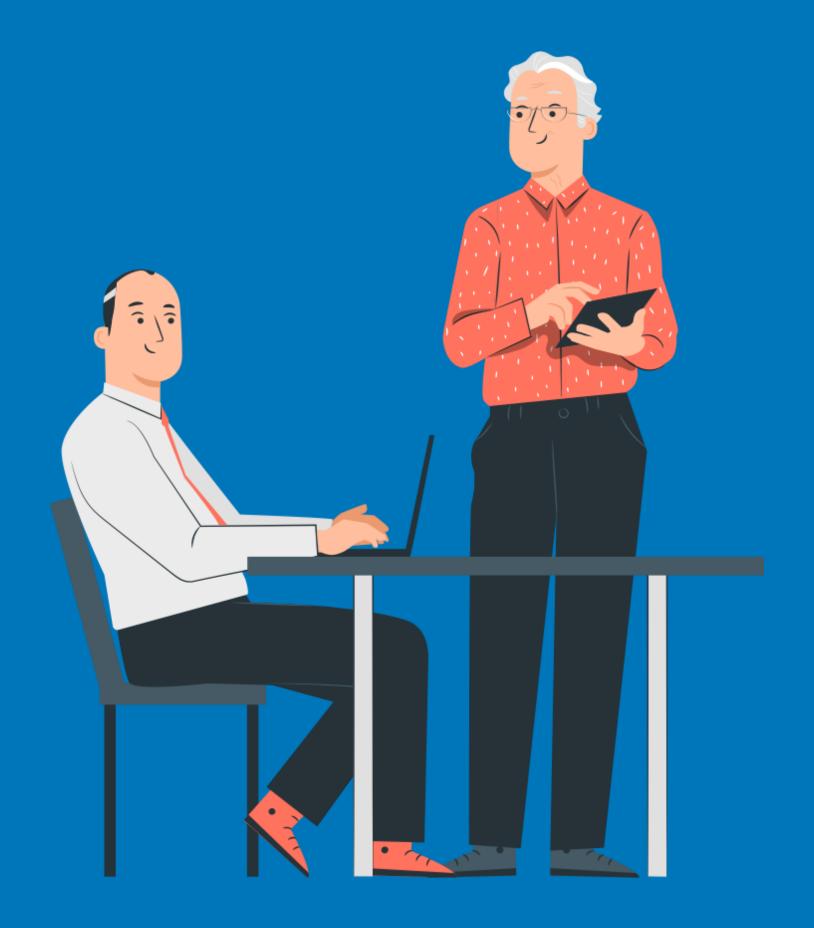# EXERCISE 4: CREATE YOUR TEAM

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STEP 4: PLAN YOUR SELF-ASSESSMENT

You should be well-organisised and understand
the issues well. You should also know:

- What questions to ask
- What answers you want
- Where to find answers
- How to collect data

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YOUR ORGANISATION'S PERFOMANCE ISSUES

After you have your team(s) formed, the first task is to decide the performance issues you would like to assess about your organization. Usually, organizations want to assess the overall effectiveness, efficiency, relevance, or financial viability of their work.

- EFFECTIVENESS: How well your organisation is achieving its mission
- EFFICIENCY: How well your organisation is using your resources to reach the mission
- RELEVANCE: Is your organisation serving the deaf community and stakeholders appropriately?
- FINANCE: Does your organisation have money it needs to continue its work

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EXAMPLE: LOOKING AT EXTERNAL RELATIONS

A deaf association realizes they are not getting support from their donors as they wish. They would like to look specifically at External Relations to see how well the leadership has communicated with, reached out to, or collaborated with other NGOs, donors, and local resources in their country. Questions they are considering:

- How *effectively* has the development team worked with the donors to show the positive impact of their funding?
- Has the public relations team been *efficient* in sharing good news of the projects' successes to the donors, or not?
- Have their board members shared with local resources that support their organization, such as the local church and temple?
- How *relevant* and needed the projects are for the deaf community?
- Does their public relations committee have the *financial* resources it needs to do good work? (good wifi, transport to make donor visits, etc).
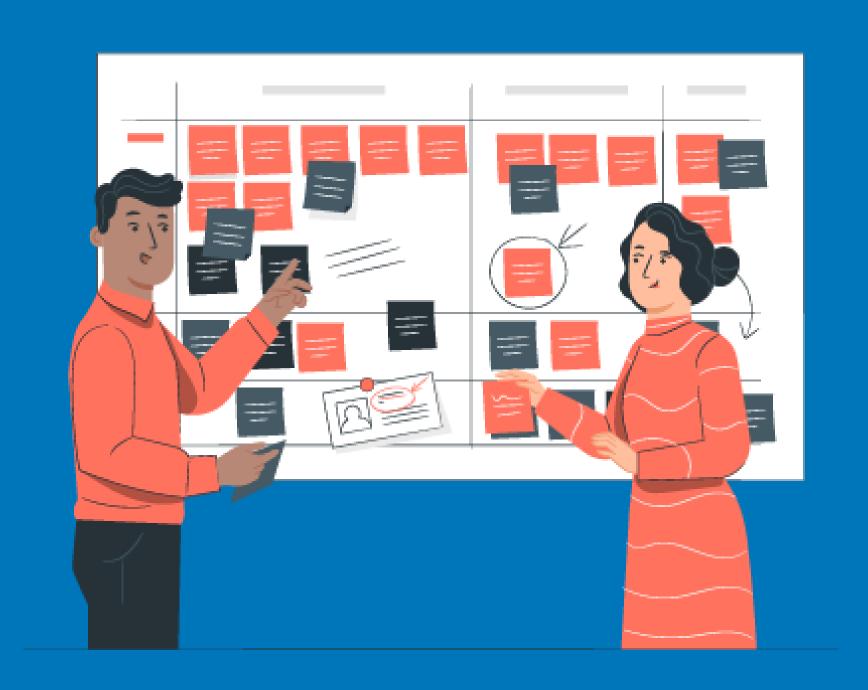
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AREAS YOUR ORGANIZATION CAN ASSESS PERFORMANCE

Governance	Management Practices	Human Resources	Financial Resources	Service Delivery	External Relations	Sustainability
The board	Organizational	Human resources	Accounting	Committee	Member relations	Organizational
Mission / goals	structure	Develop staff	Budgeting	expertise	Inter-NGO	sustainability
Members	Information	roles	Financial	Impact	collaboration	Financial
Leadership	management	Work	reporting		Donor	sustainability
Legal status	Administrative	organization			collaboration	Resource base
	procedures	Diversity issues			Public Relations	sustainability
	Personnel	Supervisory			Local resources	
	planning	practices			Media	
	Program	Salary and				
	development	benefits				
	Program					
	reporting					

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EXERCISE 5: IDENTIFY YOUR ORGANISATION'S PERFOMANCE ISSUES

1. DECIDE WHAT LEVEL OF THE ORGANISATION YOU WLL ASSESS

You can identify <u>different areas</u> that might need to be assessed.

When you look at the different areas below, you can determine to assess the performance of the whole organization or a committee, a department, a wing, or a specific work unit.

1. **What level of the organization will you assess?**

- Your assessment can look at the whole organization, a department or a committee, or a specific work unit, for example

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2. COLLECT DATA

You should consider where will you be collecting data to get the answers to your questions.

Will you review:
- Documents (ex. project reports, association minutes, official documents)?

Or/and carry out:
- Surveys?
- Interviews?
- Small group discussions?
- Workshops?
- Member meetings?

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3. DECIDE WHICH QUESTIONS TO ASK

DESCRIPTIVE	NORMATIVE	IMPACT
Explain what is	Compares what is and what should be	Determines if changes (intervention) made affected performance
Answer who, what, where, when, how, how many	Compare the current situation with an indicator (target or goal)	
Used to describe resources, activities, results		
Used to collect opinions		
Used when you want to understand or describe your organisation and how it performs		

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EXAMPLES OF QUESTIONS

DESCRIPTIVE QUESTIONS	NORMATIVE QUESTIONS	IMPACT QUESTIONS
1. Governance • What are the mission and vision of the organisation? • What are the major tasks of the board?	1. Governance • We know our mission. Are we accomplishing our mission? • Are we following our governance documents? (bylaws or rules for the board?) • Have we accomplished recruiting deafblind, deaf, and deaf with other disabilities onto our board?	1.Governance • Did the three-day board training help keep board members egaged and to stay on the board and not quit? • Did hiring the attorney get our paperwork through the government system? • Did getting feedback from the community help us write goals that reflect their needs?
2. Management • How does your organisation create your annual strategic plans? • What is the procedure to include hearing people in your organisation's meetings? • When do annual evaluations of staff happen and how?	2. Management • Have we accomplished recruiting deafblind, deaf and deaf with other disabilities as staff members? • Did we evaluate all staff members this year? • Are the strategic goals for this year being accomplished?	2. Management • Has writing policies about how staff are to serve our organisation's member improved their services? • Did writing job descriptions keep people on track? • Did the restructuring of our administration help lessen the workload of the president?
3. Financial resources • What are the total expenditures for sign language interpreters annually? • Who donated money to the organisation and what amounts?	3. Financial resources • Were our final documents submitted to and accepted by the government? • How well did we follow our budget for the year? • Did we raise as much money this year as last year?	3. Financial resources • Were our final document submitted to and accepted by the government? • Did the programs' use of volunteers decrease costs? • Were our records more accurate because of using excel this year?
4. Service delivery • What are the qualifications for the staff members? • What are the mission and vision of the organisation?	4. Service delivery • Did we reach all of our goals in delivering the services? (8 trainings in four regions) • Did we have 20 traineers in each region?	

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EXAMPLE

A deaf organization received funding to train 8 deaf health workers on HIV prevention to teach deaf youth in four regions. The organization needed to recruit 8 health workers, train them, support them when they were working in the villages and give them feedback about their work.

The deaf association won funding to continue the training in another region of their country. They already did a project evaluation of the HIV prevention program. The deaf association wanted to evaluate their performance as an organization in managing the project to help improve the future trainings.

The performance issue the evaluation identified as a problem was "Human Resources" because the organization hired 8 workers, but one missed much of the training, two dropped out and the other 5 showed some dissatisfaction with the job. Remember – this is NOT about the project's results (did the youth change their behavior and attitudes). These questions are about the PERFORMANCE of the organization.

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EXAMPLE

DESCRIPTIVE QUESTIONS
- How did the organization recruit the health workers?
- What were the job descriptions of the health workers?
- What was their contract? (Training, hours worked, money paid, expectations)
- How many health workers were recruited?

NORMATIVE QUESTIONS
- Did the health workers perform the work we asked them to do?
- Did the health workers feel they were trained well enough to teach others?
- Did the health workers enjoy their work?

IMPACT QUESTIONS - CAUSE AND EFFECT QUESTIONS
- Did the way we recruited the health workers affect the quality of the workers we hired?
- What could the organization have changed to satisfy the health workers?
- Did giving cell phones to the health workers to communicate with another region to region halfway through the project keep the remaining 6 workers from quitting? If so, why?

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4. CREATE INDICATORS

After you have listed all your questions, you need to decide what you want the answers to be. What responses will satisfy your organization? If you wanted to know if all the health workers were satisfied with their training, you hope the answer is "yes."

1. Were the health workers satisfied with the training?   1. Yes 2. No
2. How many health workers finished the training? 1 2 3 4 5 6 7 8
3. Did the trainers think the training was worthwhile? (bad) 1   2   3   4   5 6 7 8 (great)

Did you notice these indicators were all numerical and measurable? These are quantitative questions you can count. Here are other examples:

1. What was the average score of the final test of all the health workers?   89%
2. How much more money did we raise this year compared to last? $1,233 - $1,200 = $33
3. How many regions participated this year compared to last year? 8 out of 8

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4. CREATE INDICATORS

There are also deeper questions that organizations can ask that are not numerical but help understand how to improve performance issues that are qualitative. Often, they ask the big questions such as:

1. How do the health workers think the training can be improved?
2. Why did the two health workers drop out of the program?
3. Why were the cell phones given to the health workers helpful during the project?

Sometimes questions are not measurable but are just a response to a question. Remember descriptive questions? They tell you what is.

1. What is the budget of the organization? ($120,000)
2. What is the purpose of the program? (To decrease the increase of HIV)

CHALLENGES WITH INDICATORS

Organizations might not be able to predict what the answers will be and that is why the quantitative questions are so important.
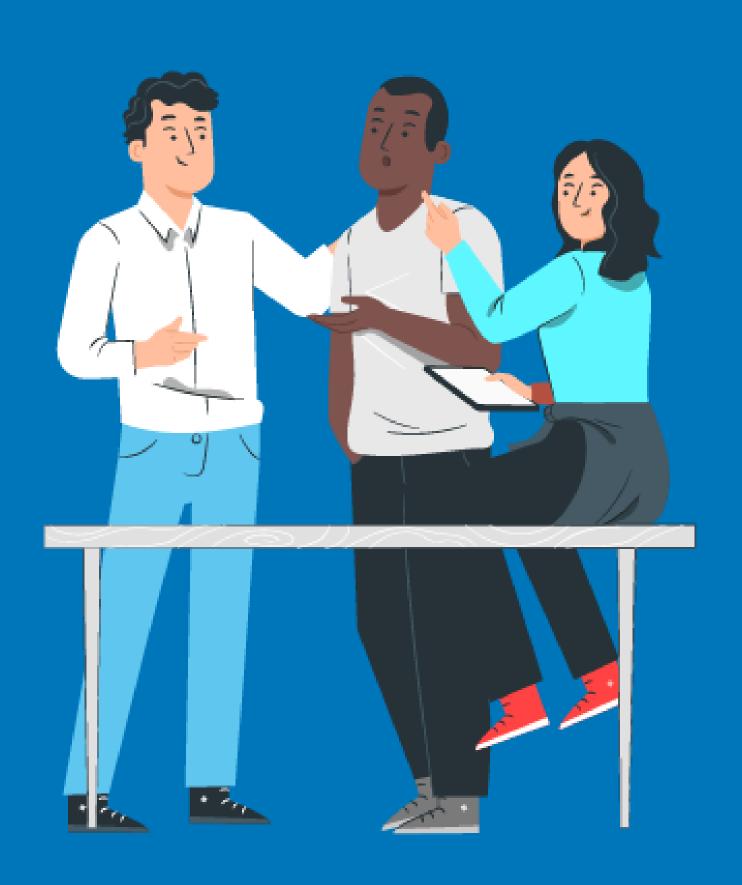
The health workers have a different perspective from the organization's administrators.

Perhaps they say the training was poor because the classroom was too hot, and they were hungry (maybe the organization would guess it was poor because the trainer signed badly, or the materials were too difficult).

It is okay that the indicators cannot be guessed, but you do know you want indicators that will help you move forward to improve.

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EXERCISE 6: WRITE QUESTIONS WITH INDICATORS

5. CHOOSE SOURCES OF DATA

Documents
Your organization can review all the documents you have produced such as budgets, minute meetings, newsletters, reports, job descriptions, evaluation reports, brochures and promotional materials, website, financial statements, strategic plans and more.

People
Remember the list of stakeholders you listed before? These people might be the best sources of gathering data. It is important that you do not only interview just one group but rather several so that you learn different perspectives. It is fair that everyone participates so that all voices are heard. It is not right if only the powerful people answer questions because their view might be very different than people who have no power.

If you ask only the organization's leaders, they may think their trainers were fine because there were no complaints and the trainers agreed (health workers did not talk because they did not want to insult anyone).

But if you confidentially ask the health workers, they might say the training was too difficult, the trainers signed poorly, the days were too long, etc.).

It is important to include everyone to improve your organization as much as you can. You can ask groups of people at one time, or you can ask people individually. There are many ways to gather data.

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5. CHOOSE SOURCES OF DATA

Different ways to gather data	Things to consider
• Interviews one on one • Focus groups (several people at one time led by an interviewer) • A paper survey • A survey signed on a video • Electronic survey on the internet (email, on your organization's website)	• How much time do you have? • How much money will it cost? • Can everyone read? • Does everyone know sign language? • Do people have access to the internet? • Can woman speak to men? • Can an interviewer be a woman? • Will women be comfortable talking in front of men? Alone? • Will people be able to travel to the interview space? • Do the people like/dislike/know the interviewer?

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