

Introduction

Your organization works toward the betterment of the deaf community by advocating for, achieving, and defending your members' human rights. A nation develops when the civil society (ex.: organizations, associations, unions, NGOs) hold governments accountable to fulfill the rights of all their citizens.

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. The organization attempts to influence the environment while at the same time, the environment is influencing the organization. For example, changes in new technologies, shifting government policies or culture all influence how well an organization succeeds in their goals. Some organizations survive and thrive while others fail.

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.

Self-Assessment methods

In this module on assessment of your organization, your organization will have some control over the assessment by either:

- 1. Assessing completely by people from within your organization
- 2. Assessing with people from your organization and from outside your organization or
- 3. Assessing led by an external organization but with substantial input from people in your organization.

Does your association need to do a self-assessment?

Reasons for conducting a self-assessment:

To help make strategic decisions – Is your organization ready to grow? Should your organization merge with other deaf organizations? Should your organization split into two? Should you change your mission or goals?





- To help make **decisions about programs** Should your deafblind program expand? Should the youth program share events with another organization's youth program? Should new health services specialized for LGBTQ+ deaf people be offered?
- To help make **financial decisions** Should you look for new or different kind of funders? Should you join efforts with another organization to find funding together. Do you need to close one program and put money into another program?
- To help you decide about **staffing** Do you need people with different skills to support the mission? Are some people unneeded?
- To generally identify **strengths and weaknesses** to improve the organization
- To identify **issues and challenges** now to resolve before things become worse.
- To gather facts and information about your organization's performance for funders and stakeholders

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.

A self-assessment for better organizational performance

A deaf association already did evaluations of their programs and projects but never assessed how the organization performed. They decided the time was right to do a self-assessment of the strengths and weakness of how the organization performed since:

- A new president was arriving, and information could help her lead better
- The deaf community had many new deaf members with additional disabilities and the association wanted to be sure they were meeting the community's needs
- The organization's expenses were growing, and they needed to understand their strengths to attract new funders

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.





A self-assessment because of funding cuts

A deaf association expected funding from an international non-governmental organization (INGO). The INGO had internal financial problems and could not give the deaf association money. The deaf association realized that they either had to close, let some staff go, or close some programs. Which would be best to do? Would it be possible for the association to continue with a smaller staff or fewer programs? Maybe they should close? A self-assessment helped them gather the information to look at the different options. They made an informed decision to stay open with a smaller staff and one less program.

(Do Exercise 1: Identifying the reasons why your organization should do a self-assessment)

Is Your Organization Ready to do a Self-Assessment?

To be ready for a self-assessment your organization must have cultural readiness, leadership readiness, resource readiness, vision and strategy readiness, people readiness and systemic readiness. If you do not have all six readiness factors, your assessment may not succeed. Your organization might decide to go ahead without all six, but it may be difficult.

Factors that can affect readiness

You must have:

Acceptance of the self-assessment by the organization's leaders

Someone who will push to make

assessment happen no matter how difficult Enough internal resources

A STRONG reason for doing the assessment

Not necessary to have but would be nice: Your organization had a positive self-

assessment in the past

No major activities or changes are going on at the same time of the self-assessment Resources (financial) in your budget to do

the self-assessment People trust the leaders

The leaders have integrity

A clear understanding of where your

organization wants to go

Some barriers that make a self-assessment difficult:

Self-assessments in the past that failed

An unclear idea of why you are doing the self-assessment

People do not have the skills or capabilities to do a quality self-assessment

People do not agree with doing the assessment or are afraid to do it

(Do Exercise 2: Identifying your organization's factor for readiness of a self-assessment)

Preparing for a self-assessment

1. Decide who will use the results of the self-assessment





Your organization needs to decide who will read and benefit from reading the final results.

- **1. Results be used inside the organization.** The results would be used by the administration, staff, board of directors and individuals who want:
- To improve decisions related to their roles or responsibilities
- For strategic management
- For organizational change.
- **2. Results will be used outside the organization.** The results would be used by funders for:
- Helping your organization learn how to perform better and make appropriate changes (Example of reason for self-assessment. "We funders support participation in decision-making by all stakeholders and want to see that is happening.")
- Understanding how their investment in your organization is achieving goals or not (Ex. "We funders gave them donations to do job training for 40 deaf women. Did they achieve their objectives?")
- Your organization to better understand your relationship with the funder. (Ex. "The funder gives us money twice a year, but would we feel more confident and be able to plan better if the money came quarterly?")

2. Identify Your 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 as many different individuals and groups are be affected by the deaf association's advocacy.

(Do Exercise 3: Identifying the Stakeholders)

3. Creating Your Team

After you have chosen the stakeholders, it is time to think about how you want to conduct the self-assessment. There are two major tasks of a team doing a self-assessment. The first task is strategically preparing the guidelines and directions for doing the assessment and to monitor the process to make sure it is running smoothly and done well. The second task is doing the data collection (surveys, interviews, group discussion, etc..). Sometimes it is good to have two teams for a self-assessment: a. strategic team and b. operational team. Do Exercise 4 to help create your team.





(Do Exercise 4: Creating a Team)

5. Planning Your Self-Assessment

The self-assessment requires you are well-organized, understand the issues well, know what questions to ask, what kind of answers you want and where to find them, and how you will collect the data.

Your organization's performance 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 organization is achieving its mission.
- Efficiency: How well your organization is using your resources to reach its mission
- **Relevance**: If your organization is still serving the deaf community and your stakeholders appropriately.
- **Financial Viability:** If your organization has the money it needs to continue its work for the present and future.

Example: Looking at External Relations for the whole organization:

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).

You can identify different areas that might need to be assessed (see table below: Areas your organization can assess performance). 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.





Areas your Organization Can Assess Performance

Governance	Management	Human	Financial	Service
 The Board Mission/ Goals Members Leadership Legal Status 	Organizational Structure Information Management Administrative Procedures Personnel Planning Program Development Program Reporting	Human Resources Development Staff Roles Work Organization Diversity Issues Supervisory Practices Salary and Benefits	Accounting Budgeting Financial Reporting	Committee Expertise Impact
External Member Relations Inter-NGO Collaboration Donor Collaboration Public Relations Local Resources Media	Sustainability Organizational Sustainability Financial Sustainability Resource Base Sustainability			

(Do Exercise 5: Identify your organization's preliminary performance issues)

1. Decide 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.

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?

3. Decide what questions you need to ask

There are 3 kinds of question to ask: Descriptive, Normative and Impact

Descriptive Questions

- Should be a snapshot of what is
- Answer who, what, where, when, how, how many
- Can be used to describe resources, activities, results
- Can be used to gather opinions
- Want to understand or describe the organization and how it performs





Examples

- Governance
 - O What are the mission and vision of the organization?
 - What is the makeup of the administrators (men/women, deaf/hearing, etc)
 - O What are the major tasks of the board?
- Management
 - o How does your organization create your annual strategic plans?
 - What is the procedure to include hearing people in the organization's meetings?
 - o When do annual evaluations of the staff happen and how?
- Financial Resources
 - What are the total expenditures for Sign Language interpreters annually?
 - o Who donated money to the organization and what amounts?
- Service Delivery
 - O What are the qualifications for the staff members?

Normative Questions

- Compares what is and what should be
- Compare the current situation with an indicator (target or goal)

Examples

- Governance
 - We know our mission. Are we accomplishing our mission?
 - Are we following the governance documents? (by-laws or rules for the board?)
 - Have we accomplished recruiting deafblind, deaf, and deaf with other disabilities onto our board?
- Management
 - Have we accomplished recruiting deafblind, deaf, and deaf with other disabilities as staff members?
 - Did we evaluate all the staff members this year?
 - Are the strategic goals for this year being accomplished?
- 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?

Service Delivery

- Did we reach all our goals in delivering the services? (8 trainings in four regions)
- Did we have 20 trainees for each region?

Impact Questions

Determines if changes (intervention) made affected the performance of the organization





Examples

Governance

- Did the three-day board training help keep board members engaged and to stay on the board and not quit?
- o 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?

Management

- Has writing policies about how staff are to serve our organization's members improved their services?
- Did writing job descriptions keep people on task?
- o Did the restructuring of our administration help lessen the workload of the president?

Financial Resources

- Were our final documents submitted to and accepted by the government?
- o Did the programs' use of volunteers decrease costs?
- o Were our records more accurate because of using Excel this year?

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.

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?

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."

- Were the health workers satisfied with the training? 1. Yes 2. No
- How many health workers finished the training? 1 2 3 4 5 6 7 8
- 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:

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

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:

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

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.





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

- What is the budget of the organization? (\$120,000)
- What is the purpose of the program? (To decrease the increase of HIV)

(Do Exercise 6: Writing 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.

Example: Question: Did the health workers feel they were trained well enough to teach others?

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.

Different ways to gather data	Things to consider	
Different ways to gather data 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)	Things to consider 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?	

