

## Tailored Organisational Assessments

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### What do we mean by Tailored Organisational Assessments?

These are processes and tools for diagnosing organisational capacity and health. The 'tailoring' refers to how we design:

- the approach
- the tools used to respond to specific needs of the organisation

This may mean adapting according to the purpose, wider context and type of organisation.

### Why we recommend this approach?

We believe this approach shows respect for each organisation's individual characteristics.

We also believe this flexible approach to be more effective as it gives a truer picture of an organisation and can lead to more appropriate actions to strengthen it.

We recognise that much effort has been made to establish agreed sets of standards in some areas of organisational life e.g. Sphere Standards. Therefore we recommend that when the assessment is directly connected to these it is important to follow their recommended process e.g. for validation purposes.

### What's in it for you?

Organisations might want to:

- do an organisational 'health check'
- identify the underlying source of specific strengths and weaknesses
- analyse their capacity to put into action a new strategic plan or strategy
- plan how to respond to a changed environment
- take stock after a change in leadership.

For example, one organisation might want to involve staff from country offices and then bring together many different views into a workshop. Another organisation might just want its trustees to assess a specific aspect of the organisation such as its stakeholder involvement.

### Tailoring the approach

Tailoring can be done in two ways:

- The first is to customize the approach to the assessment to fit the needs and circumstances of the organisation.
- The second approach involves modifying a pre-existing tool to adapt it to a particular organisation.

For example, we helped an organization customize the Governance Self-Assessment Tool developed by NCVO.

### Impact of doing a tailored OA

In addition to contributing towards the objectives identified above, there are some general benefits from a tailored OA exercise:

- it builds common understanding amongst staff
- it facilitates engagement or 'buy-in' for future changes
- it can provide a useful framework within which to explore organisational issues
- staff may feel more encouraged to raise 'difficult' issues if the environment being created is a positive and forward-looking one.

### Good practice doing Organisational Assessments

Our experience has taught us to:

- be clear what the purpose of the assessment and what it is coming out of or feeding into
- be clear who 'owns' it

- be clear whether you wish to assess all aspects of the organisation (a holistic organisational assessment) or pre-selected priority areas (a more focused Capacity Assessment)
- be clear on the approach you wish to take and who will be involved
- invest in developing an appropriate set of capacity descriptions or 'indicators' to help you in your diagnosis
- ensure you have appropriate resources (including people's time) to assign to the management and implementation of the assessment
- consider and address people's fears and anxieties about engaging in such a process
- ideally, in order to make the best use of an assessment, it should be consistently repeated over time in order to identify changes

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