



Organization Assessment Overview

Organizations too often do not make time to pause for an in-depth examination of the organization, its environment, its future, or for a searching look at organizational effectiveness. Every organization no matter how large or how small is a system. Organizational problems are linked together and change in one area often impacts other areas of the whole system. Discovering the links and how they fit together and, therefore, what steps the organization can take to improve the situation is the purpose of organizational assessments.

A Typical Assessment Process

An assessment process will typically begin by defining the questions the assessment will examine. Upon more detailed discussions of the organization's needs and circumstances, the organization assessment will employ an Action Research methodology that will help make informed choices and support the change process through:

- Detailed planning with key leaders and members regarding the focus and processes of the assessment, including: who will be surveyed, what questions will be asked, and which formats will be used to gather information;
- Data gathering utilizing interviews, informal focus groups, and questionnaires to elicit members' input regarding the strengths and limitations of current organization procedures and practices;
- Analysis of findings by the internal team with the guidance of the consultant to identify common themes, major inconsistencies and opportunities to build upon;
- Action planning by the internal team to propose changes in policies, procedures and systems, based on the data, to assess the risk of making changes, and to determine who will be instrumental in implementing the chosen action plan to ensure the long-term impact of the change initiative; and
- Evaluation by the internal team and consultants to assess the effectiveness of the change process.

Sample Organization Assessment Projects

ACG administered an organizational assessment, on behalf of the national organization. The research and resulting recommendations were used by the national office in a number of ways including: 1) to identify areas of perceived strengths and weaknesses in the organization; 2) quantify organizational needs and expectations, both at the national and affiliate levels; 3) guide strategic, financial, resource allocation and tactical decision making at the national level; 4) form a baseline against which progress in achieving organizational objectives can be measured; and 5) guide future restructuring to strengthen the affiliate network. ACG assisted the organization for three years in the implementation phase, specifically in the areas of executive director transition and coaching, governance restructuring and Board development, strategic planning, clarifying national and affiliate roles, resources needs and field program development.

ACG administered an audit of the senior and midlevel management and of the organization. The research measured five tenets: knowledge, behavior, opinions, attitudes and values. Of these, the last three measured peoples' perception of the truth, not the truth itself. As such, the findings were presented as a guide to potential actions, but not as a determinant of them. Based on the key findings of the audit and assessment ACG was asked to make specific recommendations for action by the organization. ACG worked with the organization for over two years to implement the action plan. Areas where ACG assisted the organization included: role clarification, communication skills, conflict management, restructuring of the management team, and conducting staff wide on becoming a learning organization training.

About Beth Applegate, Principal Consultant

Beth Applegate is the principal of Applegate Consulting Group (ACG), an organization development (OD) practice that assists national and international nonprofit organizations, government agencies and socially responsible for-profit corporations with developing human and organizational capacity and building a more just and equitable society. Our work is inextricably linked to advancing democratic processes and humanistic values. Beth Applegate can be reached at Beth@applegateonline.com.