

## Does organisational assessment help anyone?

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Formalised assessment tools are often not flexible enough to take into account the unique story or biography of the organisation.



It has become common for Northern NGOs or donors, who support the development of Southern CBO/NGO partners, to conduct “Organisational Self-Assessments” with their partners. Many frameworks used to analyse or diagnose organisations have been converted into convenient tools and checklists for assessing organisational functioning so that plans could be implemented for improvement to happen.

### MOVING BEYOND LIFELESS, TECHNICAL EXERCISES

But these assessments for organisational improvement can digress into lifeless, technical exercises that do not capture the true nature of the organisation. The tools and checklists usually focus more on the formal, visible aspects of an organisation such as its structures, procedures and management systems, especially the financial accounting systems, with the aim of assessing its capacity to manage the funding it gets from the Northern donor. These are the mostly visible aspects of the organisation, but there is also a lot about an organisation that one cannot easily see using such assessment tools, things that are far more influential in determining an organisation’s function.

### TAKING DIVERSITY INTO ACCOUNT

The assessments tend to measure what the local partner organisation looks like compared to a standard healthy Northern-type professional organisation. But standardised assessments seldom take account of the huge diversity of organisational forms in Southern societies. For instance, the assessment tool might ask whether the organisation has a functioning and registered Board, whereas a more appropriate question might be whether the organisation actually needs a Board in the first place. Perhaps a particular local organisation, being very traditional, is best governed in traditional ways. Or, alternatively, perhaps it is so innovative that it has surpassed the normal conventions and requires a completely different approach.

### APPROACHING SOCIAL MOVEMENTS

CBOs and social movements need to be approached with particular care. Often they function best in apparently messy and disorganised ways when compared with “efficient” professional organisations. As such they enable ordinary non-professional people to lead and participate. Imported assessments can steer such organisations into becoming ineffective professional clones, losing their local ways and their connection with the people.

### MATTERS OF JUDGEMENT

Assessment is judgemental and since organisations are never perfect, there will always be gaps in every aspect. As a result of assessments organisations are often left feeling inadequate and undermined. Besides, the measures used are almost always imported and seldom developed by

the local CBO/NGO, using its own ideas of what is valid and useful. For example, when CDRA assessed its own organisation, which it felt to be fairly healthy, using one of the most common instruments (OCAT), the practitioners were surprised to see that they had scored low marks in areas where they knew themselves to be strong and unique.

Formalised instruments are often unable to take account of progress over time, i.e. the story or biography of the organisation. Why is this important? Well, a CBO/NGO might get low scores from the checklist, and think that they need help in certain areas. But maybe if they had been scored a year earlier it would reveal that they had improved significantly since then in these areas and will continue to improve, if left alone. A “static” assessment can be very destructive, undermining the important gains an organisation has made.

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### AVOIDING THE SIMPLISTIC DIAGNOSIS

Simplistic diagnosis – for example, “the staff are under-performing in their field-work because they lack skills” – can throw everyone off track. The assessment instrument might lead them to conclude that they need more skills training, whereas their skills may be technically fine and the reasons they are under-performing are deeper, relating to a lack of confidence, being over-worked, or unsure of what is expected of them. Instruments that tend to compartmentalise problems can easily fail to surface deeper causes.

Outsiders who bring external assessment instruments, even like the ones in this book, must be careful not to undermine people’s own ways of seeing themselves. At the end of this chapter we describe some approaches which can integrate well with local ways of seeing. Organisations are so much more interesting and complex than these often rather lifeless tools are able to reveal. We need to expand our abilities to fully appreciate organisations as wonderful creations of human nature.

