

1

Assessing the internal organisation

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Section 1

Mission and values

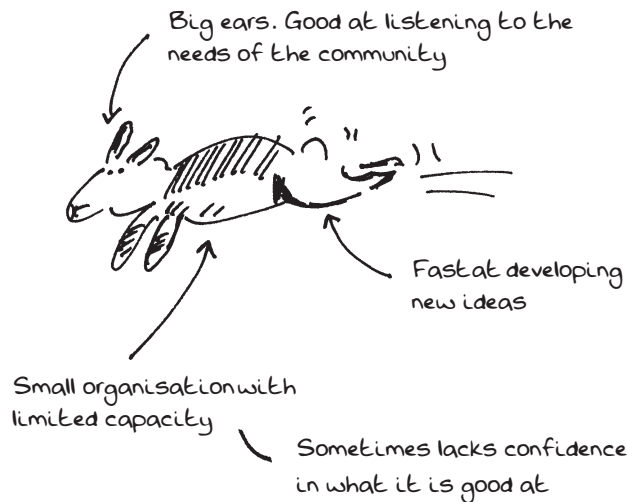
The key areas of Mission and values are:

- Mission
- Strategy
- Christian distinctiveness
- Compassion
- Non-discrimination.

Stage 1 DISCUSSION STARTER Draw your organisation as an animal (30–45 minutes).

If you drew your organisation as an animal what would it look like?

- Ask participants to each draw an animal that represents their view of the organisation.
- Share pictures.
- Look for common themes and what is missing.
- Ask what these pictures tell about vision and values in your organisation.
- Summarise the main reflections on a large sheet of paper.



Stage 2 QUESTIONNAIRE Ask each participant to fill out the QUESTIONNAIRE on their own. This should take around 15 minutes. Please use the questionnaire on pages 35–36.

Stage 3 SUMMARY SCORE SHEET Transfer the numbers circled on the questionnaire to the corresponding KEY AREA TABLES on page 37. For each key area, add the scores and divide the total by the number of indicators. This will give an average which should be rounded to the nearest whole number.



QUESTIONNAIRE Mission and values

Name of organisation _____ Date _____

- Please indicate your answers by drawing a circle around the number that best describes your view.
- The more truly and honestly you answer each question, the more useful this assessment will be to the organisation.

		rarely	occasionally	often	always
1	STAFF BEHAVIOUR Staff make personal sacrifices in response to the needs of other staff and project beneficiaries	1	2	3	4
2	ORGANISATIONAL DOCUMENTS The organisation's policies and strategies are consistent with the organisation's mission and values	1	2	3	4
3	ORGANISATIONAL PLANS The organisation's plans are consistent with its strategies	1	2	3	4
4	STAFF AWARENESS Staff can explain the organisation's mission and values and how these relate to their work	1	2	3	4
5	ORGANISATIONAL ACTIVITIES The organisation's activities are consistent with its policies, strategies and plans	1	2	3	4
6	PROJECT BENEFICIARIES Project beneficiaries are identified on the basis of their marginalisation, economic poverty and powerlessness	1	2	3	4
7	EVALUATION The organisation's leadership and staff evaluate the performance of the organisation according to its policies and strategies	1	2	3	4
8	TERMS AND CONDITIONS OF EMPLOYMENT Staff believe terms and conditions of employment, such as salary levels, annual leave, and maternity/paternity benefits, are fair	1	2	3	4
9	RESPECT FOR OTHERS Those with whom the organisation works are always treated as people made in God's image, regardless of their religious beliefs	1	2	3	4
10	CHRISTIAN VALUES The values of the organisation are based on a biblical understanding of Christianity	1	2	3	4
11	ORGANISATIONAL DOCUMENTS Compassion is expressed as a core value in the organisation's most important documents, for example, the organisation's Constitution and Mission Statement	1	2	3	4
12	DECISION-MAKING When making decisions, staff consider the needs of the marginalised, the economically poor and the powerless	1	2	3	4
13	LEADERSHIP The organisation's leadership refers to, and reminds staff of, the organisation's mission, values, policies and strategies	1	2	3	4

continued...

QUESTIONNAIRE Mission and values continued

		rarely	occasionally	often	always
14	TIME FOR PRAYER The organisation sets aside regular time for prayer	1	2	3	4
15	PROJECTS Projects are planned and implemented to meet the needs of the marginalised, the economically poor and the powerless	1	2	3	4
16	TREATMENT OF OTHERS Staff demonstrate a positive and welcoming attitude towards stakeholders	1	2	3	4
17	TREATMENT OF MARGINALISED GROUPS Staff treat marginalised groups fairly, and encourage others to treat these groups fairly	1	2	3	4
18	VALUE OF PRAYER Staff value prayer – for one another, project beneficiaries, and the work of the organisation	1	2	3	4
19	ORGANISATIONAL VALUES The organisation’s values support the achievement of the organisation’s mission	1	2	3	4
20	NON-DISCRIMINATION POLICY The organisation has a written non-discrimination policy that reflects a commitment to equality for staff and project beneficiaries regardless of gender, age, ethnicity, religion and disability	1	2	3	4
21	THEOLOGICAL REFLECTION The organisation incorporates theological reflection into its understanding of poverty, its work and its relationships	1	2	3	4
22	LEADERSHIP The leadership ensures that non-discrimination is integrated into all aspects of the organisation’s work in line with the organisation’s non-discrimination policy	1	2	3	4
23	SENSE OF MISSION Staff believe that what they are doing is important and worthwhile	1	2	3	4
24	STAFF AWARENESS Staff can explain the organisation’s strategies and how these relate to their work	1	2	3	4
25	RECRUITMENT Staff are recruited and paid on the basis of their skills and experience, and not their gender, age, ethnicity, or religion	1	2	3	4
26	STRATEGY RELEVANCE The organisation’s strategies address the causes of marginalisation, economic poverty and powerlessness	1	2	3	4
27	STAFF TRAINING The organisation provides training in non-discrimination to all staff	1	2	3	4
28	INVOLVEMENT OF STAKEHOLDERS The organisation’s strategies are established through the involvement of stakeholders	1	2	3	4



SUMMARY SCORE SHEET

Mission and values

Name of organisation _____ Date _____

MISSION		
2	Organisational documents	
4	Staff awareness	
5	Organisational activities	
13	Leadership	
19	Organisational values	
23	Sense of mission	
		Total
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

COMPASSION		
1	Staff behaviour	
6	Project beneficiaries	
8	Terms and conditions of employment	
9	Respect for others	
11	Organisational documents	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

STRATEGY		
3	Organisational plans	
7	Evaluation	
24	Staff awareness	
26	Strategy relevance	
28	Involvement of stakeholders	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

NON-DISCRIMINATION		
12	Decision-making	
15	Projects	
17	Treatment of marginalised groups	
20	Non-discrimination policy	
22	Leadership	
25	Recruitment	
27	Staff training	
		Total
(To find average, divide total by 7 and round to nearest whole number)		AVERAGE

CHRISTIAN DISTINCTIVENESS		
10	Christian values	
14	Time for prayer	
16	Treatment of others	
18	Value of prayer	
21	Theological reflection	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

Stage 4 PLENARY SCORING Draw a PLENARY SCORING TABLE similar to the one given on page 29 onto a large sheet of paper. Adapt it by writing in the key areas for this section of the module.



Stage 5 ANALYSIS Analyse the patterns of the scores on the PLENARY SCORING TABLE. When you have identified the weak key areas, draw INDICATOR TABLES similar to the one on page 30 onto large sheets of paper. Write in the relevant indicators.

Stage 6 RANKING PRIORITIES FOR CAPACITY BUILDING Select the three weakest areas in which capacity needs to be built. Discuss how these areas will be addressed and what resources will be needed.

Stage 7 ACTION PLANNING Write an action plan to show how you will address the areas in which capacity needs to be built. A sample action plan is given on page 31. An action plan template for this module section is given on page 39. The template should be photocopied and filled in.

Action plan MISSION AND VALUES

KEY AREA	INDICATOR	DEFINITION	AVERAGE SCORE	COMMENTS	ACTION REQUIRED	BY WHOM	BY WHEN

Section 2

Management 1

The key areas of Management 1 are:

- Leadership
- Governing body
- Planning
- Staff participation
- Financial management

Stage 1 DISCUSSION STARTER: THINKING ABOUT FAMILIES

The concept and the word 'family' may help to facilitate a discussion of how organisations are managed. Though a family is not a formal institution, the decision-making process, communication and allocation of responsibility are similar.

Divide the group into pairs and ask them to discuss the following questions for 20 minutes.

- How does your family take the responsibility for different decisions?
- What role does your extended family (eg: spouse's parents) play in family decision-making?
- How does your family learn from its experiences?
- How does your family plan for the future?
- How are the resources of your family managed (assets and money)?

After 20 minutes ask each pair to share one new insight with the rest of the group.

Ask the group to point out the parallels between the family processes of leadership, decision-making, communication and managing resources, and those of an organisation.

Stage 2 QUESTIONNAIRE

Ask each participant to fill out the questionnaire on their own. This should take around 15 minutes. Please use the questionnaire on pages 41–42.

Stage 3 SUMMARY SCORE SHEET

Transfer the numbers circled on the questionnaire to the corresponding KEY AREA TABLES on page 43. For each key area, add the scores and divide the total by the number of indicators. This will give an average which should be rounded to the nearest whole number.



QUESTIONNAIRE Management 1

Name of organisation _____ Date _____

- Please indicate your answers by drawing a circle around the number that best describes your view.
- The more truly and honestly you answer each question, the more useful this assessment will be to the organisation.

		rarely	occasionally	often	always
1	COMMITMENT The organisation's leadership has humility before God and a commitment to the needs of others above their own	1	2	3	4
2	FINANCIAL UNDERSTANDING The staff member responsible for managing the organisation's finances understands the organisation's financial strengths and weaknesses	1	2	3	4
3	PROJECT MANAGEMENT Staff are involved in the management of projects	1	2	3	4
4	BOARD COMMITTEE AND CONSTITUTION The role and responsibilities of the board committee are clearly documented in the organisation's constitution	1	2	3	4
5	STYLE OF LEADERSHIP The organisation's leadership displays love, joy, peace, patience, kindness, goodness, faithfulness, gentleness and self-control	1	2	3	4
6	PLANNING PROCESS There is a documented process for how the organisation should plan and review its work	1	2	3	4
7	FINANCIAL ADVICE The staff member responsible for managing the organisation's finances gives clear and relevant advice to the leadership	1	2	3	4
8	STAFF OPINIONS The organisation's leadership encourages staff to express their opinions about issues, and is open to different points of view	1	2	3	4
9	BOARD COMMITTEE BEHAVIOUR The members of the board committee make personal sacrifices in response to the needs of staff and project beneficiaries	1	2	3	4
10	COMMUNICATION WITHIN THE ORGANISATION Planning takes into account the plans of other sections of the organisation	1	2	3	4
11	BUDGET MANAGEMENT The leadership manages the organisation's budget, and anticipates and avoids financial deficits	1	2	3	4
12	STAFF REPRESENTATION The organisation's leadership co-operates with a staff representative committee	1	2	3	4
13	GOVERNANCE The members of the board committee assist the leadership in establishing the organisation's mission, values, policies and strategies, and in reviewing the organisation's performance and finances	1	2	3	4

continued...

QUESTIONNAIRE **Management 1** continued

		rarely	occasionally	often	always
14	COMMUNICATION SKILLS The organisation's leadership communicates well with staff, and clarifies expectations	1	2	3	4
15	RESOURCES Plans take account of the financial and human resources available	1	2	3	4
16	STAFF SKILLS AND EXPERIENCE The staff members responsible for managing and handling the organisation's finances have relevant professional skills and experience	1	2	3	4
17	MEETINGS The organisation's leadership invites relevant staff to attend meetings, circulating agendas in advance of the meetings, and having given thought to work commitments that might prevent attendance	1	2	3	4
18	DELEGATION OF MANAGEMENT The members of the board committee ensure that the organisation is well-managed, and do not attempt to manage it themselves	1	2	3	4
19	STAFF MOTIVATION The organisation's leadership motivates staff through affirmation and encouragement	1	2	3	4
20	DELEGATION The organisation's leadership delegates wisely, giving staff opportunities to take responsibility for areas of work	1	2	3	4
21	FINANCIAL TRANSPARENCY The organisation's financial management is transparent and the leadership is open to discuss financial issues with stakeholders	1	2	3	4
22	SKILLS AND EXPERIENCE The members of the board committee have relevant professional skills and experience, and work together as a team in partnership with the organisation's leadership	1	2	3	4
23	DECISION-MAKING The organisation's leadership makes decisions after analysis of the views of stakeholders, risks, the availability of resources, and changes in the current situation	1	2	3	4
24	OBJECTIVES Plans identify objectives that are realistic and measurable, and have achievable timeframes	1	2	3	4
25	FINANCIAL TRUST Stakeholders trust the organisation because it has good financial management	1	2	3	4
26	INFORMATION Staff have the necessary information and opportunities to contribute to the organisation's mission, values, strategies, policies, and plans	1	2	3	4
27	MANAGING CHANGE The organisation's leadership works together as a team	1	2	3	4
28	MONITORING The organisation's leadership and staff regularly monitor the implementation of plans against objectives, and alter the plans where necessary	1	2	3	4

SUMMARY
SCORE SHEET

Management 1

Name of organisation _____ Date _____

LEADERSHIP		
1	Commitment	
5	Style of leadership	
14	Communication skills	
19	Staff motivation	
20	Delegation	
23	Decision-making	
27	Managing change	
		Total
(To find average, divide total by 7 and round to nearest whole number)		AVERAGE

GOVERNING BODY		
4	Board committee and constitution	
9	Board committee behaviour	
13	Governance	
18	Delegation of management	
22	Skills and experience	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

PLANNING		
6	Planning process	
10	Communication within the organisation	
15	Resources	
24	Objectives	
28	Monitoring	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

STAFF PARTICIPATION		
3	Project management	
8	Staff opinions	
12	Staff representation	
17	Meetings	
26	Information	
		Total
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

FINANCIAL MANAGEMENT		
2	Financial understanding	
7	Financial advice	
11	Budget management	
16	Staff skills and experience	
21	Financial transparency	
25	Financial trust	
		Total
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

Stage 4 PLENARY SCORING Draw a PLENARY SCORING TABLE similar to the one given on page 29 onto a large sheet of paper. Adapt it by writing in the key areas for this section of the module.



Stage 5 ANALYSIS Analyse the patterns of the scores on the PLENARY SCORING TABLE. When you have identified the weak key areas, draw INDICATOR TABLES similar to the one on page 30 onto large sheets of paper. Write in the relevant indicators.

Stage 6 RANKING PRIORITIES FOR CAPACITY BUILDING Select the three weakest areas in which capacity needs to be built. Discuss how these areas will be addressed and what resources will be needed.

Stage 7 ACTION PLANNING Write an action plan to show how you will address the areas in which capacity needs to be built. A sample action plan is given on page 31. An action plan template for this module section is given on page 45. The template should be photocopied and filled in.

Action plan MANAGEMENT 1

KEY AREA	INDICATOR	DEFINITION	AVERAGE SCORE	COMMENTS	ACTION REQUIRED	BY WHOM	BY WHEN

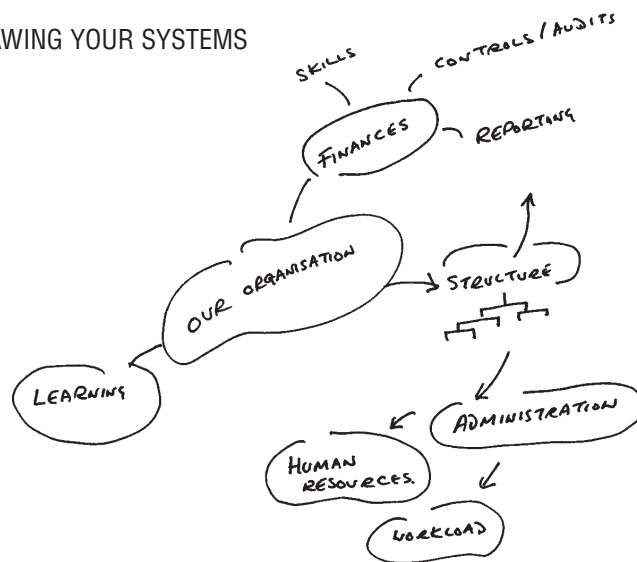
Section 3

Management 2

The key areas of Management 2 are:

- Organisational structure
- Financial reporting procedures
- Human resource management
- Administrative systems
- Human resources
- Self-reflection and learning.

Stage 1 DISCUSSION STARTER: DRAWING YOUR SYSTEMS



In small groups brainstorm all the systems that exist in your organisation. Then create a chart that shows how they link and support the work of the organisation. This might look like a huge web of lines that interconnect to key parts of the organisation. Allow 15 minutes for this.

Then invite each group to analyse their diagrams and identify which systems are strong and which are weak. Allow 10 minutes.

Ask each group to share one insight with the rest of the group. Allow 15 minutes.

Stage 2 QUESTIONNAIRE Ask each participant to fill out the questionnaire on their own. This should take around 15 minutes. Please use the questionnaire on pages 47–49.

Stage 3 SUMMARY SCORE SHEET Transfer the numbers circled on the questionnaire to the corresponding KEY AREA TABLES on page 50. For each key area, add the scores and divide the total by the number of indicators. This will give an average which should be rounded to the nearest whole number.



QUESTIONNAIRE Management 2

Name of organisation _____ Date _____

- Please indicate your answers by drawing a circle around the number that best describes your view.
- The more truly and honestly you answer each question, the more useful this assessment will be to the organisation.

		rarely	occasionally	often	always
1	ORGANISATIONAL DESIGN The organisation's leadership has adopted a structure for the organisation that ensures maximum effectiveness and the best use of resources	1	2	3	4
2	FILING SYSTEMS The organisation's filing system ensures all documents are well-organised and easy to access	1	2	3	4
3	FINANCIAL REPORTING The staff members responsible for handling the organisation's finances report regularly and promptly about their activities	1	2	3	4
4	STAFF NUMBERS, SKILLS AND EXPERIENCE The organisation has sufficient people with the necessary professional skills and experience, and key positions are fully staffed	1	2	3	4
5	RECRUITMENT Staff are recruited on the basis of an agreed level of skills and experience for each position	1	2	3	4
6	ACCOUNTING PROCEDURES The organisation uses reliable accounting procedures to ensure that financial resources are managed properly	1	2	3	4
7	STRUCTURE The organisational structure chart shows the lines of responsibility between the different positions in the organisation	1	2	3	4
8	INTERNAL COMMUNICATIONS Information is communicated accurately and promptly to all relevant staff	1	2	3	4
9	ACCOUNTING STANDARDS The organisation's financial reports comply with national accounting standards and are acceptable to stakeholders	1	2	3	4
10	ORGANISATIONAL DOCUMENTS The organisation has a written personnel handbook or policy that describes recruitment, termination of employment and work rules for all staff	1	2	3	4
11	LEARNING FROM OTHERS Before undertaking work, staff learn from stakeholders and others who have relevant knowledge and experience	1	2	3	4
12	CO-ORDINATION There is co-ordination between the different sections of the organisation	1	2	3	4

continued...

QUESTIONNAIRE **Management 2** continued

		rarely	occasionally	often	always
13	EXTERNAL COMMUNICATIONS Letters, e-mails, phone calls and faxes are dealt with promptly by appropriate staff	1	2	3	4
14	FINANCIAL REPORTS The organisation's financial reports are comprehensive and accurate, including all income and expenditure for the period covered, together with brief explanations for any discrepancies	1	2	3	4
15	INFORMATION Staff have the necessary information to carry out their job effectively	1	2	3	4
16	LEARNING REVIEW On completion of work, staff review the results with stakeholders, and share lessons learnt with them	1	2	3	4
17	ORGANISATIONAL REVIEW The organisation's leadership reviews the structure of the organisation at key points in the life of the organisation to ensure maximum effectiveness and the best use of resources	1	2	3	4
18	DEADLINES The organisation uses a system to help staff meet planning and reporting deadlines	1	2	3	4
19	ANNUAL INDEPENDENT AUDIT The organisation's accounts are audited annually by independent professionally qualified auditors	1	2	3	4
20	STRATEGIC PLANNING The organisation's strategies and plans include the number of staff needed and their required skills and experience	1	2	3	4
21	JOB DESCRIPTIONS Job descriptions and terms and conditions of employment include the skills and experience required, the duties to be undertaken, the reporting relationships and the key indicators of performance	1	2	3	4
22	LEARNING OPPORTUNITIES The organisation provides opportunities and facilities to increase the knowledge, skills and experience of staff	1	2	3	4
23	LEVELS OF RESPONSIBILITY The organisational structure allows delegation of responsibility and encourages innovation	1	2	3	4
24	MEETINGS Meetings are called in advance, have a clear agenda, are recorded in written minutes, and involve relevant staff members	1	2	3	4
25	ACCOUNTABILITY The board committee and the organisation's leadership have access to accurate information about the organisation's finances	1	2	3	4
26	VOLUNTEERS AND TEMPORARY STAFF The organisation has motivated and committed volunteers and temporary staff who contribute to the achievement of the organisation's plans	1	2	3	4

continued...

QUESTIONNAIRE **Management 2** continued

		rarely	occasionally	often	always
27	APPRAISALS The organisation ensures that staff performance appraisals are conducted and documented at least once a year	1	2	3	4
28	RECORDING LESSONS LEARNT The organisation has procedures for staff to record lessons learnt	1	2	3	4
29	CONTACT DETAILS The organisation maintains a database with details of contacts	1	2	3	4
30	STAFF TURNOVER The level of staff turnover does not reduce the effectiveness of the organisation	1	2	3	4
31	PROFESSIONAL DEVELOPMENT The organisation provides opportunities for the professional development of staff	1	2	3	4
32	SHARING KNOWLEDGE The organisation encourages a culture of openness and sharing of knowledge	1	2	3	4
33	WORKLOADS Staff have reasonable and realistic workloads which do not discourage them	1	2	3	4
34	STAFF REPRESENTATION At least one person is elected by all staff to represent them in discussions with the organisation's leadership	1	2	3	4
35	LEARNING FROM PRACTICE Staff regularly review the progress of their work, and put lessons learnt into practice	1	2	3	4



SUMMARY SCORE SHEET **Management 2**

Name of organisation _____ Date _____

ORGANISATIONAL STRUCTURE		
1	Organisational design	
7	Structure	
12	Co-ordination	
17	Organisational review	
23	Levels of responsibility	
Total		
(To find average, divide total by 5 and round to nearest whole number)		AVERAGE

ADMINISTRATIVE SYSTEMS		
2	Filing systems	
8	Internal communications	
13	External communications	
18	Deadlines	
24	Meetings	
29	Contact details	
Total		
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

FINANCIAL REPORTING PROCEDURES		
3	Financial reporting	
6	Accounting procedures	
9	Accounting standards	
14	Financial reports	
19	Annual independent audit	
25	Accountability	
Total		
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

HUMAN RESOURCES		
4	Staff numbers, skills and experience	
15	Information	
20	Strategic planning	
26	Volunteers and temporary staff	
30	Staff turnover	
33	Workloads	
Total		
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

HUMAN RESOURCE MANAGEMENT		
5	Recruitment	
10	Organisational documents	
21	Job descriptions	
27	Appraisals	
31	Professional development	
34	Staff representation	
Total		
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

SELF-REFLECTION AND LEARNING		
11	Learning from others	
16	Learning review	
22	Learning opportunities	
28	Recording lessons learnt	
32	Sharing knowledge	
35	Learning from practice	
Total		
(To find average, divide total by 6 and round to nearest whole number)		AVERAGE

Stage 4 PLENARY SCORING Draw a PLENARY SCORING TABLE similar to the one given on page 29 onto a large sheet of paper. Adapt it by writing in the key areas for this section of the module.



Stage 5 ANALYSIS Analyse the patterns of the scores on the PLENARY SCORING TABLE. When you have identified the weak key areas, draw INDICATOR TABLES similar to the one on page 30 onto large sheets of paper. Write in the relevant indicators.

Stage 6 RANKING PRIORITIES FOR CAPACITY BUILDING Select the three weakest areas in which capacity needs to be built. Discuss how these areas will be addressed and what resources will be needed.

Stage 7 ACTION PLANNING Write an action plan to show how you will address the areas in which capacity needs to be built. A sample action plan is given on page 31. An action plan template for this module section is given on page 52. The template should be photocopied and filled in.

Action plan MANAGEMENT 2

KEY AREA	INDICATOR	DEFINITION	AVERAGE SCORE	COMMENTS	ACTION REQUIRED	BY WHOM	BY WHEN