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Organizational Self-Evaluation: An Emerging Frontier for Organizational Improvement

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The authors have been working to improve clients' institutional performance through a framework for institutional assessment and self-assessment. In this framework, performance is defined in terms of mission fulfilment, efficiency, and ongoing relevance (the extent to which the organization adapts to changing conditions in its environment). The framework implies that certain contextual forces drive performance: the internal capacities and motivation of an organization and its external environment. The article presents the framework as well as case studies of several institutions that are using the framework to assess themselves.

Introduction

Development and Performance

The world of development has changed significantly in the last thirty years. The field has virtually abandoned the concept that simply providing a nation with additional resources or inputs can lead to the type of development results desired. Our experience, in both developed and developing countries, indicates that adding to government resources and programs does not in itself lead to accompanying changes in poverty. Development is much more complex.

Furthermore, development researchers and practitioners have learned that the dynamic of change brought about through development action interfaces with the dynamic systems in a country that are also constantly changing. Today we are just beginning to recognize the complexity of the development process. We are beginning to understand the various regulating systems – social, political, economic, etc. – and to gain some experience in intervening in them. Although experience tells us that the regulatory environment is critical to development, we are less sure about how it can be changed (World Bank, 1994).

We have also learned that development is a people process. Nations need to be able to build their people's capacity to take charge of their development. Building indigenous capacity and empowering people to take charge of their own development is crucial to development.

Inextricably linked to the development of a nation's citizenry are the organizations and institutions people create to support national development. The work of nation building includes not only the building of people and regulating systems, but also the development of institutions and organizations that operationalize the needs and aspirations of people. Many development researchers and practitioners now believe that improving the performance of key institutions is a vital ingredient for national development (Lusthaus et al. 1995).

But how do you improve the performance of institutions and organizations that are critical to development? Why do some institutions perform well and others poorly in the same or similar environments? The field of institutional development, like development itself, has undergone many changes over the past 30 years, and, like development, it is a perplexing

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area. Experience indicates that simply providing resources to bolster the work of institutions will not sustain improved performance. Nevertheless, in the absence of well-performing institutions, it is quite unlikely that national development goals will be met.

Institutional Assessment and Self-assessment

Although there has been a great deal of interest in institutional development, relatively little work has been done in supporting institutions in their quest to better understand themselves and their performance (Universalia, 1985). Institutions, like people, need to obtain feedback about how they are doing. Is the institution providing goods and services people want? Are the costs of the institution's services appropriate? Is there a sufficient quality to the work it does? Is the institution carrying out the role assigned to it? Does it have the capacity to carry out the role(s)?

In 1993, the International Development Research Centre (IDRC) and Universalia Management Group began to explore the issues surrounding ways and means to better understand how to assess institutional and organizational performance. IDRC was interested in exploring ways to gather organizational data about the centres they supported, in order to make decisions about future funding. They were also interested in an evaluation process that would use evaluation results to support organizational learning.

For over a year we reviewed the literature and analyzed our own fifteen years of experience in evaluating nongovernmental organizations (NGOs), international NGOs, and government organizations. Given the lack of theory on institutional assessment, we eventually developed our own model and a process that could be used in evaluating these organizations (Lusthaus et al. 1995).

Both IDRC and Universalia believed that self-evaluation could empower organizations and aid them in both using the evaluation and learning from it (Universalia 1991). The notion of self-evaluation also appeared to be a more sustainable approach to development: The funder would no longer simply provide funds, but rather would transfer knowledge in order to build the strategic capabilities of the organization. Furthermore, IDRC argued, organizations would be more likely to engage in experimenting with an organizational assessment model if they could control the process and be empowered by it (IDRC 1991).

This was an interesting challenge. Due to the individual natures and needs of individual organizations, self-assessment as an approach to institutional assessment is complex. We believe that a good framework for assessment must guide an institution in its own investigations into its performance – from defining its own idea of performance, to setting indicators, and finally to measuring its success.

We have been working on the challenge of improving performance and the challenge of self-assessment for over two years now and would like to share some of our experiences and the ideas that are emerging. This paper presents the framework we developed for assessing institutions as well as case studies of several institutions that are using the framework to assess themselves. We have added our own findings from this experience and have also suggested some directions for the future.

An Organizational Assessment Framework [1]

In our efforts to develop an evaluation framework that was relevant to organizations, we moved from the program as a unit of analysis to the organization itself. By and large, the framework reflected a change in focus from how well the organization did its

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programming work to how its various systems and resources provided it with what we called *institutional capacity*. As our work evolved, however, we became increasingly concerned with the organization's ability to establish priorities in its own capacity development. This lead us to refocus our framework on the organization's *performance* in its own development.

The Framework

A schematic representation of the framework is shown in Figure 1. Performance is defined in terms of mission fulfilment, efficiency, and ongoing relevance (the extent to which the organization adapts to changing conditions in its environment). The framework implies that certain contextual forces drive performance: the internal capacities and motivation of an organization and its external environment.

Figure 1

Organizational Assessment Framework

Organizational Capacity

Performance is in part driven by organizational capacity, which we now understand as existing in six basic areas: strategic leadership, human resources, core resources, programming and process management, and inter-institutional linkages. Each of these six capacity areas may be described in sub-components, as for example in the organization's strategic leadership capacity which is understood as its structure, governance, leadership, strategic plans and niche management. Human resources and core resources (financial and infrastructural capacity) are seen as resources as well as the management of these resources. Organizations also have capacities that result from the relations, partnerships and alliances they have established with other institutions – referred to as inter-institutional linkages.

Organizational Motivation

Internally, performance is also driven by the organization's motivation to perform, which refers to the organizational culture, history, mission, values and incentive systems. Like capacities, these factors affect the quality of work, the nature of how the organization competes, and the degree of involvement of institutional stakeholders in decision-making processes.

Environment

Organizations also exist within certain external contexts or environments that facilitate or impede their performance. Key factors in the policy or regulatory environment, and in the economic, political, socio-cultural, environmental and technological contexts, affect how the institution does its work, or the work it does.

Organizational Performance

In saying then that organizational performance is a function of three dominant variables – its internal capacity, its motivation, and its external environment – there remains a need to define the performance of an organization. Most organizations view their performance in terms of "effectiveness" in achieving their mission, purpose or goals. Most NGOs, for example, would tend to link the larger notion of organizational performance to the results of their particular programs to improve the lives of a target group (e.g. the poor). At the same time, a majority of organizations also see their

performance in terms of their "efficiency" in deploying resources. This relates to the optimal use of resources to obtain the results desired. Finally, in order for an organization to remain viable over time, it must be "relevant" to its stakeholders. Organizations need to continually adapt to their changing stakeholder context. This ongoing relevance is the third key dimension to organizational performance.

Applying the Framework to Self-Assessments

Over the past eighteen months Universalia has been involved in two projects that are giving us some practical insights into organizational self-assessments. In the first project, Universalia worked with and supported a self-evaluation process in 12 research and training centres in Asia. This self-evaluation process was part of a larger evaluation of a development project (Anderson and Gilsig, 1995). The second project is a set of self-assessment exercises now being conducted by Universalia and IDRC in three research centres in Western Africa. These two projects are presented below as case studies. As you will see, these experiences have raised a multitude of issues and pushed forward our changing concept of self-assessment.

Experience in Asia

As the Universalia/IDRC framework was crystallizing, Universalia was contracted to evaluate a project that supported twelve education and research centres in Southeast Asia that were part of the Southeast Asian Ministers of Education Organization (SEAMEO). There is a diverse range of specialization among the centres, from tropical biology and tropical medicine to educational innovation and technology, from science and mathematics to archaeology and the fine arts. One aspect of the project was to strengthen the institutional capacity of the SEAMEO centres through institutional linkages which supplied technical assistance, training (in Canada and at the centres), equipment and materials.

The Decision to Include Self-Evaluation

Faced with a limited travel budget, a small amount of time, and an ambitious mandate, the solution appeared to be self-evaluation – which offered at least a hope for achieving what we wanted to do. Rather than involve external evaluators who would need considerable time to understand the organizations, we opted for internal evaluators who could help us understand the answers to our questions. Thus, we adopted the Universalia/IDRC framework and made plans to apply it to SEAMEO centres.

Self-Assessment Guide

A centre self-assessment guide was developed to assist SEAMEO centres in understanding their centre, its context, future directions, and needs. The self-assessment tool was a 50-page guide that provided a procedure and content to assist centres in conducting a thorough self-assessment of their capacities and performance, and a conceptual framework for centres to help refine and develop. A draft of the guide was discussed with selected centre directors and then modified to be more useable in the SEAMEO context.

The Self-Assessment Process

This was conceived as a two-stage process in which the centres would conduct their own self-assessments and then Universalia would react, raise questions and submit a formal critique. Completion of the centre self-assessments involved major data collection and analysis activities within each centre. Each centre mobilized an assessment team, ranging in size from three to thirteen staff members (three-quarters of the teams were composed of more than six members).

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Team members reviewed key documents, talked to people involved at different levels in the centre, observed facilities and activities, and observed interactions between people in different contexts (classroom, meetings, etc.). They discussed their observations and worked to reach a consensus on the different issues presented in the self-assessment guide. The centres then sent their completed guides to Universalia. It was a complex process in which centres participated with varying levels of effort, and this was reflected in the depth and quality of data that was collected.

Universalia reviewed the completed centre self-assessments and prepared summaries of each one, with a short analysis of concerns and priorities. At their annual meeting, Centre Directors met individually with a Universalia team member to discuss the self-assessments. The summaries were treated as confidential to the evaluation team and the respective centres. After the annual meeting, the Centre Directors took the summaries back to their assessment teams for review.

Follow-up communications with centres helped ensure that the resulting analysis was correct and acceptable to the centre. It was decided at this time that the self-assessments would not be included in the evaluation synthesis report, although aggregate findings would be embedded in the report. The self-assessments were a significant part of the evaluation owned exclusively by the participants themselves.

Results and Outcomes

Those centres that put significant effort into the self-assessment indicated to us that they had learned a great deal about their organizations in terms of future directions and needs, and Universalia learned a great deal both about the centres and about the process of self-assessment. The assessments complemented the ongoing strategic planning activities of the centres and were clearly an area in which the centres owned the process and the data. The results were encouraging as at least one of the centres plans to make this a regular activity. We realized, however, that much more support is required to get the most out of the process.

Experience in Western Africa

The self-assessment process in Africa was undertaken in three research centres: The Centre Ivoirien de Recherche Économique et Sociale (CIRES) in Ivory Coast, the Centre d'Études de Documentation et de Recherche Économique et Sociale (CEDRES) in Burkina Faso, and the Conseil pour le Développement de la Recherche Économique et Sociale en Afrique (CODESRIA) in Senegal.

The self-assessments had two main purposes: to increase the strategic capacities of the research centres, by allowing groups of managers inside the centres to identify the key issues and needs of the institutions; and to generate data and findings that would serve as a basis for an external review of the institutions conducted for IDRC by Universalia.

IDRC (Canada) funded the process. IDRC (Senegal) acted as regional project head, and was responsible for coordination and ongoing communication with the three centres, and for problem-solving when issues emerged in the process. Universalia facilitated the process and was responsible for transferring self-assessment skills and knowledge to members of each centre, and for providing IDRC with an expert judgement on the self-assessment reports developed by each centre.

The self-assessment process included five phases: planning, identification of strategic issues, development of a workplan, data collection and analysis, and reporting. The centres have completed four of the phases and are writing their reports.

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Planning

During the planning phase, Universalia provided all centres with background information and materials about the assessment process. In addition, Universalia conducted a needs assessment visit to each centre in order to a) ensure a common understanding of self-assessment, b) understand the contexts of the different centres; c) begin to develop, with each centre, the main strategic issues of their institutions.

Identifying the Issues

In order to identify the key strategic questions, Universalia conducted a three-day workshop with senior executives at each of the three centres. Together they learned about the purpose of the exercise, acquired skills in self-assessment, and worked in groups to begin to identify key strategic questions which the organization was facing.

They began with a diagnostic process that helped them examine the main performance issues. Once the diagnostic was done, centres identified the causes around performance issues, and conducted a review of their external environment, a review of the motivation factors affecting performance, and a review of the capacity factors affecting performance. This process led to the identification of key strategic issues.

Some issues were similar amongst the three centres: the alignment of programs with the capacities inside the centres and with the various and sometimes conflicting demands of stakeholders; human resource capacities (more specifically, the capacity of researchers) to meet objectives; and increasing the quality and the regional scope of their research. Each centre also identified issues more specific to their context, such as governance issues, technological systems issues, and leadership issues.

Developing a Workplan

A team of managers and researchers at each centre developed a data collection workplan based on the key strategic issues they had identified. The workplan aimed at identifying the best sources of data on each issue, identifying the most appropriate methodology to collect the data, developing indicators of performance for the key questions, and developing a time frame for collecting the data.

The three centres took different approaches to developing their workplans. In one centre the workplan was done by two senior managers of the centre who shared it for consultation with the team. In another centre, the process was very participatory and senior managers played a facilitating role in developing the workplan document. Universalia played a supporting role in this process, responding to requests, while IDRC actively visited centres on two occasions to ensure that the process was unfolding according to the schedule.

Collecting and Analyzing Data

Each centre opted for very different ways of collecting and analyzing data. One centre hired an external consultant to collect and analyze data on some of the main issues, and provide a report containing findings and recommendations. This report will be appended to the self-assessment report written by the centre. Another centre collected data through a three-day workshop that brought together the major stakeholders of the centre. The workshop was facilitated by some of the managers of the centres and participants came prepared with work done prior to the workshop. Participants worked in small and large groups to organize data; synthesis and analysis was done in plenary sessions. The third centre identified a self-assessment team of managers inside the centre that divided the tasks of collecting and analyzing the data amongst the team members. Universalia and

IDRC were involved as participants in the data analysis phase.

Results and Outcomes

The self-assessment process is continuing in the three centres. When they are complete, Universalia will conduct an external review of the self-assessment reports for IDRC. Throughout the process, the centres have monitored their lessons learned about the process and their experience, and have participated in shaping the findings.

What We Are Finding

The Importance of Organizational Readiness

Before beginning the process of self-assessment, one needs to assess if the organization is ready for it. According to a recent analysis of participation in development, readiness is related to an organization's culture, climate, resources, and motivation (IDB 1995). The dimensions of our own framework also reflect the need for some type of preliminary assessment of readiness.

Cultural readiness is reflected by the degree to which an organization and its members are willing to disclose information, and to see disclosure as an opportunity for learning rather than as a threat. (In both Africa and Southeast Asia, participants were anxious about revealing personal information to a large audience. In Southeast Asia in particular, the notion of maintaining and saving "face" is a strong cultural value.) A corollary to this notion is the degree to which an organization is ready to see information as useful for self-improvement and to act on it.

Self-assessment also requires a climate of trust, participatory management, and a desire to improve. Organizations in which the management leadership styles are most transparent and open appeared to benefit most from a self-assessment exercise.

A third issue of readiness concerns the resources of an organization, both human and financial. Self-assessment requires strategic thinking skills, as well as capacities for data collection, strong analysis, and visioning. In our experiences in Africa and Asia, these skills were not evenly spread within the organizations, although some centres had initiated strategic management processes to develop skills and readiness. In addition to skills, an organization also needs the financial resources to support self-assessment — the will and the skills alone are not enough to support this time-consuming process. Although all three of the organizations in Africa seemed to understand the importance of self-assessment, only one put real resources into the process. In Southeast Asia, the commitment of resources seemed to be directly related to the director's attitude toward the initiative.

The willingness to change as the result of a self-assessment process is another sign of an organization's readiness. In some cultures, improved organizational performance does not necessarily link to better personal reward. Until an organization and its members see the benefits of change and are motivated to change, it is unlikely that the process of self-assessment will have any lasting effect (Guba and Lincoln 1989).

The Need for a Champion

Because motivation and commitment are key factors in the self-assessment process, it requires one or more individuals within the organization who are able to see the benefits of the process and to motivate others to become engaged. In Asia, one internal champion was relatively new to the organization but was able to engage his colleagues in the process. He provided the "engagement energy" and used it to establish himself as a strategic leader in the organization. In one centre in West Africa, however, we were confronted with an

interesting paradox. In this case, the centre's executive director became the champion of the self-assessment process, but saw this as an opportunity for him and a small group of managers to "tell the institutional story." If the involvement and participation of a wide range of stakeholders is a critical part of the self-assessment process, then this is not the champion needed (UNDP 1994).

The Need to Clarify "Performance"

Certain Western Africa centres questioned our framework for organizational performance – effectiveness, efficiency, and relevance. They considered these distinctly North American notions and wondered if they were transferable to regions where organizational performance might be defined by other criteria. The centres in Southeast Asia were facing major shifts in their resources bases and were attuned to "demand-driven" thinking and the need for "sustainability." And, although they readily understood the concept of performance as expressed in the framework, they too expressed a concern that the performance values expressed by the funder differed from their own. It is clear that we need to spend more time and effort to help organizations understand and define their performance criteria.

The Importance of Process

Goulet (1989) refers to participation as either a goal or as a means. If participation is intended to do nothing more than help in the analysis, it may represent yet another example of the dominant group exploiting the intended beneficiaries. If it is viewed as a legitimate approach to development, then it may be an excellent way to empower development participants in a sustainable way (Guba and Lincoln 1989). In Western Africa, the centres had some difficulties adjusting to the weightiness of the self-assessment process. In a compliance evaluation, developing TORs and a workplan and drafting a report may be the natural steps. In a self-assessment, however, the process is as important as the document output – a fact which needs to be reflected in the steps of the process. In future exercises, we believe there should be greater emphasis on coaching around the change process. For example, team efforts such as working together on visioning, problem-solving, and sorting data, all require people skills and group skills which many centres were not accustomed to using.

The Importance of Trust and Transparency

The notion of creating a common body of knowledge (Freedman 1994, 57) is a good one, particularly if one realizes that it is not necessary that every group of participants be involved in collecting all the information or even that people endorse the perspectives of the other groups. Once the information is shared at least people can challenge it and, with supportive group processes, can use it to build their understanding of how others act on the common knowledge. It is naive, however, to think that a process of self-assessment funded by a major funder can be purely a "self" assessment. Some centres questioned the honesty of the process, the conflict of interest with the funder, and the difficulty they had in conducting a self-assessment with frequent interruptions and interference from the funder. This is essentially an issue of trust. A self-assessment has a better chance of being successful if the funder-recipient relationship is open and transparent.

An Opportunity for Learning

It is continually surprising to us to find out how little people know about their own organizations. In most of the organizations we have worked with, participants told us that the self-assessment process provided them with a tremendous opportunity to learn about their own organizations.

The Time Requirement

The self-assessment process is an ongoing and therefore time-consuming process. Every organization we worked with indicated to us that they had little time to engage in self-assessments or reflections. They needed the self-assessment process to be quick or to follow a rapid assessment approach. We have been unsuccessful so far in meeting this requirement.

The Need to Clarify Basis of Judgement

As we attempted to help organizations assess their effectiveness, efficiency and relevance, it became harder to agree on a clear definition of these terms. All sectors, but specifically the NGO community and the not-for-profit groups, need to develop both standards and benchmarks that would help them better understand when they are successful. If, for example, an organization meets 50% of its goals, is this "effective"? If 70% of stakeholders say that the organization is meeting their needs, is the organization "relevant"?

The Need for Deadlines and Support to Meet Them

In order for the self-assessment process to work, it appears organizations need to be accountable to both their funders and their own leadership for completing the process. This may require specific deadlines as well as support to complete the process. In two of the three centres involved in this process in Africa, the self-assessment process fell significantly behind schedule. This may be partially due to the relatively small amount of pressure that was put on the organization to complete the self-assessment. Centres that set deadlines that could not be moved kept to their deadlines. In fact, all twelve organizations in Southeast Asia met the deadlines, even though the time frame was very short.

The level and the nature of the support requested in the self-assessment process varied from one organization to another: One organization in Africa requested more support at the brainstorming stage — they wanted to more information before making a decision. Another institution requested more technical support, and tools and instruments to guide their planning process. A third institution made no requests for support. As facilitators, we needed to accommodate the individual processes and develop coaching methods that suited their needs.

The Importance of Identifying the Audience

Early in the process, it is important to clarify the purpose of the self-assessment process and to identify the future users and readers of the report. This can reduce the level of stress and ambiguity associated with the process. In Western Africa, self-assessment reports will be used differently in each centre. One centre, which saw the report as a marketing and promotional document, was hesitant at addressing some of the strategic issues with all the required transparency. A second centre viewed the self-assessment report as a "business plan" with which it could seek funding. A third centre did not want to include anything in the report that might harm their future relationship with their funders. If the purpose and audience for the reports had been clarified earlier, these organizations might have been less hesitant and the process could have been expedited.

Conclusions: Looking to the Future

Our experience with organizational self-assessment has promoted further reflection on the concept of self-assessment: What are the salient characteristics of effective self-assessment in organizations? It is not simply a question of organizations participating in their

own diagnosis. It relates fundamentally to an organization owning the process. By being theirs, the process is self-directed and can be considered a self-assessment. Moreover, this concept of ownership has several corollaries that are related to an organization's assessment agendas, perspectives and values.

Through ownership, the involved organization sets the agenda. It determines the critical questions; it frames how they are worded and how they are prioritized. In essence, the organization takes charge of its own development — at the point of development it has reached. Theoretically, organizations go through various stages of development and the pertinent agenda will naturally vary according to this stage of development; more importantly, the organization will formulate its questions using terms acceptable to those involved. In this exercise, however, the introduction of a common language for certain key concepts, as in our framework, is helpful to organizations interested in reviewing their performance. Thus, a concept such as performance can have a common definition while respecting the organization's idiosyncratic ways of talking about it.

Even without formal backgrounds in organizational theory, individuals involved in organizations bring their own perspectives to any attempt at organizational evaluation. Furthermore, there is an inherent reluctance in many organizations to accept other people's models and this can temper their interest in adopting any particular framework. We are finding, however, that the organizations we have worked with are willing to use the model we have developed with IDRC as a springboard to their own formulations and understanding. We believe organizations need to find their own meaning — and our framework is helpful in aiding the search.

Perspectives on methodological issues are more complex and we are learning that there are many misunderstandings and differing perspectives that need to be accommodated. Self- assessments do not have to take on the methodological purity of publishable research, but they do need to be valid representations of an organization's reality. This raises the debate about what constitutes methodological soundness. Although the statistician may see no need for more than a small sample, the organization may insist that every member and client have a chance to state his or her views. Some stakeholders will trust questionnaires, others may not. Some will emphasize quantitative performance indicators while others will be mostly interested in qualitative perceptions.

People involved in these processes also have widely differing values. For example, what constitutes good performance of a university department? How important is good teaching? What emphasis is placed on research? Are contributions of the department to the community considered important? Even within the broad categories, academics debate long and hard about the relative merits of book chapters vs. refereed articles vs. conference proceedings (not to mention the standards attributed by different people to different publishers, journals and conferences), single vs. joint or multiple authorship, and so on. The power of the self-assessment process is that it affords primary stakeholders an opportunity to clarify values without the imposition of unhelpful external values.

We are trying to learn about these issues by attempting to help organizations engage in self-assessments using our framework and self-assessment aids (Universalia 1995). The hope is that we can develop capacities and systems that extend beyond point-in-time evaluations to approaches that facilitate and encourage ongoing monitoring of performance. In our view, this is a more productive approach to development than are models based on strictly external assessment to satisfy an external agenda using external perspectives and based on external values.

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Notes

1. for a full discussion, see Lusthaus et al. (1995)

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