

# ORGANISATIONAL SELF-ASSESSMENT TOOL

## KEY

- 0 = No or n/a (don't have)  
 1 = Represents the worst case or lowest ranking  
 5 = Represents the best case or highest ranking, or 'Yes'  
 For 'Yes/No' questions you should answer 0 for No and 5 for Yes

## STRATEGY

Component Score:										
Purpose			0	1	2	3	4	5	Score:	
<i>Your purpose is your reason for existing. It distils the context that you are operating in and the problem that you are trying to solve.</i>		Do you have a clear and documented organisational purpose?	0					0		
		How well does your purpose describe your 'reason for existing'?	n/a	0	0	0	0	0		
		How far do your staff buy into your purpose?	n/a	0	0	0	0	0		
		How well can staff explain your purpose?	n/a	0	0	0	0	0		
		How well can people outside your organisation explain your purpose?	n/a	0	0	0	0	0		
Organisational Goals			0	1	2	3	4	5	Score:	
<i>Your goals are what you think success looks like. They explain what you want to achieve using your unique expertise and resources.</i>		Do you have clear and documented organisational goals?	0					0		
		How far do your organisational goals define what success looks like?	n/a	0	0	0	0	0		
		How well do they align with your organisation's purpose and pillars of work?	n/a	0	0	0	0	0		
		How far do your staff buy into your goals?	n/a	0	0	0	0	0		
		How well can staff explain your goals?	n/a	0	0	0	0	0		
		How well can people outside your organisation explain your goals?	n/a	0	0	0	0	0		
Pillars of Work			0	1	2	3	4	5	Score:	
<i>Your pillars of work are how you organise your work to achieve your purpose and goals.</i>		Do you define your pillars of work anywhere?	0					0		
		How well do they align with your organisation's purpose and goals?	n/a	0	0	0	0	0		
		How well do your projects and activities fit under your pillars of work?	n/a	0	0	0	0	0		
		How well can staff explain your pillars of work?	n/a	0	0	0	0	0		

# ASSETS

Component Score:								
Structure		0	1	2	3	4	5	Score:
The framework you use to organise your resources to best deliver your strategy.	Do you have a clear and documented...?							
	Organisation/staff structure	0					0	
	Definition of roles and responsibilities	0					0	
	Definition of external experts' role in your organisation	0					0	
	Project structure	0					0	
	How appropriate is your structure for delivering your strategy (purpose, goals and pillars of work)?							
	Organisation/staff structure	n/a	0	0	0	0	0	
	Project structure	n/a	0	0	0	0	0	
	How well does your structure utilise your organisation's capabilities to the full?							
	Organisation/staff structure	n/a	0	0	0	0	0	
	Project structure	n/a	0	0	0	0	0	
	How agile is your structure? In other words, how easy is it to adjust your structure when your strategy changes?							
	Organisation/staff structure	n/a	0	0	0	0	0	
	Project structure	n/a	0	0	0	0	0	

ASSETS (cont)

Component Score:									
Capabilities		0	1	2	3	4	5	Score:	
Your organisation's combination of skills, expertise and resources in or on specific areas or issues.	Do you know what your organisation's capabilities are?	0					0		
	How far do your organisation's capabilities meet the needs of your strategy (purpose, goals and pillars of work)?		0	0	0	0	0		
	How far do all of your capabilities set you apart from others in your field? In other words, are they unique, or stronger than others in your field?		0	0	0	0	0		
	How would you rate your organisation's capabilities in ...?								
	Strategic planning	n/a	0	0	0	0	0		
	Leadership	n/a	0	0	0	0	0		
	Financial Management	n/a	0	0	0	0	0		
	Project Management	n/a	0	0	0	0	0		
	Substantive expertise	n/a	0	0	0	0	0		
	Communications	n/a	0	0	0	0	0		
	Innovation	n/a	0	0	0	0	0		
	How far are you investing to improve/build on your capabilities?		0	0	0	0	0		

## ASSETS (cont)

Component Score:									
Systems & Processes			0	1	2	3	4	5	Score:
<p><i>A process is a set of methodical steps or activities to get something done. A system is a when several related processes are put together.</i></p>		How would you rate your systems or processes for the following important areas?							
		Strategy development and review	n/a	0	0	0	0	0	
		New business development	n/a	0	0	0	0	0	
		Governance and decision making	n/a	0	0	0	0	0	
		Human resources management	n/a	0	0	0	0	0	
		Financial management	n/a	0	0	0	0	0	
		Projects (including design, management and learning)	n/a	0	0	0	0	0	
		Organisational learning	n/a	0	0	0	0	0	
		Internal communications	n/a	0	0	0	0	0	
		External communications	n/a	0	0	0	0	0	
		Ideas and innovation	n/a	0	0	0	0	0	
		In general, how far are your systems and processes fit for purpose? (i.e. are they designed with a motive and to be efficient?)		0	0	0	0	0	
		In general, how strong is your staff's understanding of all systems and processes?		0	0	0	0	0	
Networks & relationships			0	1	2	3	4	5	Score:
<p><i>These are the actors and institutions that you know, and work with or for.</i></p>		How strong is your understanding of the actors with power and influence in your field?		0	0	0	0	0	
		To what extent is your core network made up of the actors with power and influence in your field?		0	0	0	0	0	
		How effective are your core networks/relationships in delivering your strategy (or achieving the change you want to see)?		0	0	0	0	0	
		How diverse is the range of actors that you have strong relationships with?		0	0	0	0	0	
		How far is your organisation participating in and collaborating with actors/networks in your field?		0	0	0	0	0	
		How far are relationships shared between the people in your organisation?		0	0	0	0	0	

# SUSTAINABILITY

Component Score:								
Mitigation of external threats		0	1	2	3	4	5	Score:
<i>An organisation's ability to survive and thrive.</i>	How strong is your understanding of the external threats and risks to your organisation? (e.g. regime change, economic recession, lawsuits)		0	0	0	0	0	
	How resilient would your organisation be to external threats?		0	0	0	0	0	
	How would you rate your organisation's external risk management strategy?	n/a	0	0	0	0	0	
Financial health		0	1	2	3	4	5	Score:
	How would you rate...?							
	<i>Your current financial status</i>		0	0	0	0	0	
	<i>How you track and measure your financial status</i>		0	0	0	0	0	
	<i>Your financial planning/new business pipeline</i>	n/a	0	0	0	0	0	
	<i>The diversity of your funding sources in terms of numbers</i>		0	0	0	0	0	
	<i>The diversity of your funding sources in terms of type of funders</i>		0	0	0	0	0	
	How would you rate the financial skills of the following people?							
	<i>Finance team</i>		0	0	0	0	0	
	<i>Leadership and management</i>		0	0	0	0	0	
	<i>Project staff</i>		0	0	0	0	0	

## SUSTAINABILITY

Component Score:								
Talent/leadership pool		0	1	2	3	4	5	Score:
An organisation's ability to survive and thrive.	How would you rate your organisation's...?							
	Succession planning	n/a	0	0	0	0	0	
	Leadership pipeline	n/a	0	0	0	0	0	
	Middle management pipeline	n/a	0	0	0	0	0	
	Is your organisation investing in talent internally, by building capacity and skills to take on middle management and leadership roles?	0				0		
	Do you offer employment packages or training schemes to make you a more attractive employer?	0				0		
	How successful is your organisation at retaining talent?		0	0	0	0	0	
Institutional knowledge capture		0	1	2	3	4	5	Score:
	How far do the following statements reflect your organisation's current approach to data management?							
	Well structured	n/a	0	0	0	0	0	
	Appropriate for the scale of the organisation (staff and projects)	n/a	0	0	0	0	0	
	Well managed	n/a	0	0	0	0	0	
	Accessible (including when traveling)	n/a	0	0	0	0	0	
	Intuitive (i.e. easy for a user to navigate)	n/a	0	0	0	0	0	
	How would you rate your organisation's...?							
	Spread of expertise (i.e. several staff have expertise on an issue/area)		0	0	0	0	0	
	Systems/processes for learning from previous projects/activities	n/a	0	0	0	0	0	
	Knowledge sharing practices	n/a	0	0	0	0	0	