straight to the
POINT ❯

Practical Management Assessment

Taking into consideration implementers' limited time and resources, the tools in Pathfinder International's *Straight to the Point* Series provide clear, concise guidance on a variety of issues related to program design, implementation, and evaluation.

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Assessment Objectives

THE OBJECTIVES OF THIS TOOL ARE TO:

- Assess organizational skills, systems, knowledge, and practices in 4 key areas related to organizational management;

- Identify important capacity gaps; and

- Provide the foundation for making an action plan to address these gaps.

AREAS COVERED BY THIS TOOL:

- Organizational structure
- Operations
- Long-term strategy
- Decision making

How to Use this Tool

Identifying the interviewer: This assessment can be conducted by an external assessor (for example, by a group planning to provide capacity building support to the organization) or by the organization itself as part of an internal learning process. If conducted as a self-assessment, the assessment team should include members from multiple levels of the organization, and there should be ongoing discussion and feedback among the team members.

Conducting the interviews: You should interview a variety of people in the organization, including representatives from the organization's leaders, contact staff, non-contact staff, and volunteers. Try to interview representatives from as many relevant groups as possible so that you gain a clear, comprehensive understanding of the organization's management capacities. By speaking to a variety of people about similar issues, you can learn how different groups perceive the organization's effectiveness and areas of need.

Interview methodology: If the assessment is conducted by an outside group, this is also an important opportunity to begin building productive, collaborative relationships with the organization. Remember that this is not a test— it is an opportunity to determine which capacity areas are in most need of support. The interview should be informal and conversational. You do not need to fill out the assessment tool as you are conducting the interview, but you should keep it with you and use it as a guide as you take notes in the space provided for description/justification (or in a separate notebook for later reference). Do not circle the ratings as you are conducting the interview, but do make sure organizational representatives understand what a "yes" or "no" means, and why each capacity area is considered important. When you fill out the profile be sure to justify your assessment (i.e., write the reasons for your decisions).

If the assessment is being conducted by someone outside the organization, the assessment team should visit the organization (spending at least half a day with them) to conduct interviews with relevant individuals and learn about their work and work environment. A copy of this tool should be shared with the organization prior to the assessment to give them the opportunity to read through and ask questions.

Developing a management action plan: After completing the interviews, review the capacity area questions where the respondents gave a "no" answer and their suggestions for how that area could be addressed. Each question is designed to illustrate an ideal characteristic of that capacity area and to inform how the gaps might be strengthened. Discuss your observations with members of the organization and ask for their feedback. Together, determine which areas related to management will need to be prioritized and supported.

Key Terms

GOALS	The result of organizational or programmatic activities which the organization uses to measure progress and achievement.
GOVERNANCE	The provision of leadership and direction to an organization, including oversight of important organizational functions like setting goals, planning, and managing financial and human resources.
LEADERSHIP	The capacity of senior organizational members to provide guidance and direction in an organization to support it toward the achievement of its goals.
MANAGEMENT PRACTICES	The mechanisms intended to coordinate the organization's activities and facilitate processes within an organization.
OVERSIGHT	Monitoring and supervision of organizational direction, activities, and progress.

General Information

Organization name: _____ Contact person: _____

Address:_____

Physical location: _____

Phone number: _____ Main contact email address: _____

Interviewer(s): _____

Date(s) visited: _____ Duration of visit(s): _____

List all people interviewed and their position in, or relationship to, the organization:

PERSON INTERVIEWED	POSITION IN/RELATIONSHIP TO THE ORGANIZATION

List all supporting documents (such as mission statement, policies, or procedures) collected as part of the assessment process. Copies of these documents should be attached to the final assessment.

Organizational Structure

Are the roles and responsibilities in your organization clearly defined? (For example, through job descriptions and an organogram.) *If YES, explain. If NO, how could you address this?*	YES	NO
Do the members of your organization understand how tasks and responsibilities are assigned? *If YES, explain. If NO, how could you address this?*	YES	NO
Are organizational relationships (between different teams, between supervisors and their supervisees) made clear, such as through an organogram? *If YES, explain. If NO, how could you address this?*	YES	NO
Does your organizational structure make it easy to get information and collaborate to complete tasks? *If YES, explain. If NO, how could you address this?*	YES	NO

Long-term Strategy

Does your organization have a long-term (3–5 years) strategy in place? *If YES, explain. If NO, how could you address this?*	**YES** **NO**
Is your long-term strategy reviewed on an annual basis? *If YES, explain. If NO, how could you address this?*	**YES** **NO**
Is your long-term strategy developed with input from members, the Board, and the people you serve? *If YES, explain. If NO, how could you address this?*	**YES** **NO**
Do your Board and senior management measure progress toward your long-term strategy's goals? *If YES, explain. If NO, how could you address this?*	**YES** **NO**

Operations

Do you routinely collect information about the results of your organization's activities?	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Is it clear who is responsible for collecting, storing, and sharing information?	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Do you have systems in place to store and share information? (For example, a database, a newsletter.)	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Is it easy for members and leaders to quickly access information to help make decisions?	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Does your organization have staff and systems that support overall operations, such as human resources systems and administrative procedures?	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Are these systems effective? Do they support smooth operation of your organization?	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Is it easy for you to access the tools you need to do your work? (For example, computers, notebooks, materials for events.)	**YES** **NO**
If YES, explain. If NO, how could you address this?	

Decision Making

Is it clear who has decision-making power in your organization? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**
Are important decisions, and the reasoning behind them, shared across the organization? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**
Are information, data, member input, and feedback from the community used to inform decisions? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**
Are the results of your activities used to inform decisions and to improve program implementation? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**
Do the members of the organization view the decision-making process as fair and transparent? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**
Does your organization have a system to allow members to challenge leadership decisions? If yes, are they used? *If YES, explain. If NO, how could you address this?*	**YES**	**NO**

Cover photo: Kathryn Mimno