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ASSESSING YOUR ORGANIZATIONAL ASSETS

A Manual for Managers of Private Voluntary Organizations
Involved in Family Planning



The Enterprise Program



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Chapter I.

The Benefits of an Organizational Assessment

Private voluntary organizations (PVOs) have traditionally made significant contributions to family planning programs throughout the world, and their importance is growing. As national programs increase in size and diversify in terms of projects and services, the range of activities in which PVOs participate is rapidly expanding. For example, organizations once devoted primarily to supplies distribution are now combining these activities with information, education, and communication (IE&C) campaigns. Others that began in general community development are now specializing in health. Still others, whose programs have not changed in nature, are serving increasing numbers of clients, extending their geographic coverage, and interacting with a wider range of organizations participating in family planning activities.

Changes in services, introduction of new technologies, and increases in responsibilities challenge the PVO to broaden its expertise, both technical and managerial. Equally important is the need to ensure that all of the organization's assets are as highly developed and well used as possible. While expansion of PVO activities in family planning has been supported in part by increased funding and technical support from international donors and national governments, these increases have generally

been disproportionate to the growing demands placed on PVOs. Meeting these demands requires that the PVO take careful stock of itself, assess its strengths, and take advantage of opportunities for change.

This manual meets that need. It offers the PVO manager a simple, practical, structured way to (1) identify and analyze all of the assets available to the organization and (2) identify opportunities for change or improvement with the potential to strengthen the organization's contribution to the spectrum of family planning programs and services. The analysis focuses not on "outputs" or achievements, but on what assets the organization has and how well they are used.

Assets are traditionally thought of as people, money, time, and materials. This manual takes a much broader view, extending the assessment to consider reputation, relationships, and other factors that have a major impact on the organization's vitality and performance. In examining opportunities for change, the manual allows you to determine your organization's needs in the framework of what you already have and in the context of your own operating environment. It also helps you recognize the importance of your own leadership and choose the ways you will lead the institution into the future. It is a thoroughly practical tool, directing you toward what can be done within the specific constraints that apply to your organization.

How the Assessment Works

This manual guides you through a straightforward organizational assessment process. After introducing the concept of assets, Chapter II helps you to assess those that pertain to your organization in terms of their level of development and their importance to the organization. You may then select the areas you would like to examine and proceed in any order you choose. If you decide to look at all of your assets, then the sequence presented in the manual will probably work best.

Chapter III suggests ways in which the assessment can be conducted and how you can stimulate support for it from within the organization. The development of one or more assessment teams is recommended. Teams give participants a stake in the findings and generate broad-based commitment to organizational change. They also enrich the process itself by bringing to it wide-ranging information and diverse points of view.

Chapters IV through XIII address each asset type separately. Each chapter begins with a discussion of how the asset can contribute to the organization and suggests the kinds of things you might look at to see whether or not maximum use is being made of that asset. The purpose is to help you understand how broadly a single asset, such as the organization's goals or its network of relationships, can affect operations and performance, and how you can take better advantage of it. That discussion is followed by exercises that will guide you through the assessment process, where you identify important strengths

as well as opportunities for change and improvement. While the manual stops short of proposing solutions to problems you may identify, it does provide a framework in which you can make decisions regarding appropriate strategies for change.

The final chapter focuses on reviewing assessment findings and identifying ways to move forward. It also suggests the kinds of assistance that may be available to you in your community or through donors and how you can use them. The Appendix contains a list of readings and other reference materials that you may wish to consult.

Why this Approach Works

- The assessment is simple and straightforward and can be conducted successfully without outside assistance. You know your organization, and you can apply that knowledge. Although consultants can collaborate with you and lend yet another perspective to your organizational review, you can complete the process independently. No special training is required.
- There are no fixed standards against which you must measure your organization. Rather, you develop your own targets based on your analysis of what you have to work with, the unique characteristics of your local environment, and what kinds of change you want to achieve.
- The approach recognizes the unique character and environment of your organization. Instead of presenting "model" structures or systems toward which you must strive, it allows you to analyze and react to what you find in the context of your own organization's history, style, position, resources, and aspirations. You choose the areas in which you want to grow.
- The approach is flexible. You can decide how to conduct the assessment. You can also select discrete areas for study and schedule the process as you see fit.

● No theoretical background in organization development or analysis is required. While a list of suggested readings is included in the appendix for those who are interested in organization theory, the approach is eminently practical and immediately focuses on the realities that exist within your organization.

What You Will Gain from the Assessment

You will be devoting time and effort to the assessment, and you should therefore expect to reap some important benefits.

The kinds of gains you can realize are:

- A new appreciation for your assets and a better understanding of their strengths and interrelationships.
- Targeted opportunities for change and improvement that will guide you in deciding how to use your assets.
- Enhanced analytic skills and a new method for self-assessment.
- Increased awareness of how important regular self-assessment is to organizational growth and achievement.
- Baseline information that can be used in periodic assessments to monitor change.
- New avenues of communication within the organization that strengthen the in-house problem-solving capability.
- A pragmatic understanding of what you can control and do in leading the organization forward.
- A strong and common commitment to change within the organization.

Chapter II.

Identifying Your Organizational Assets

Every organization has a wealth of assets. One of the major factors in an organization's success is its ability to make and keep its assets strong and to use them in meeting the organization's challenges. Continuous challenges are an organizational fact of life, especially for family planning PVOs. Sometimes these challenges are the result of your own successes. Satisfied clients urge new people to come to you for services, and you stretch to accommodate them. Similarly, the success of another organization with related services may increase your clientele. The availability of donor support is another potential challenge; it may influence a change in existing programs or the establishment of new ones. Government social and economic policies are another example of challenges you may face. You can surely add others to this list.

The point is that the environment is dynamic, and the organization must marshal all its available resources to keep up with it. However, strong organizations do not simply react to changes. They also creatively use their assets to influence the environment and increase their ability to control it. Knowing what you have to work with is the first step in developing this ability.

What Kinds of Assets Does an Organization Have?

Most organizations have ten kinds of assets. These categories are briefly defined below. Since every PVO is different, you may discover that your organization has additional assets on which to draw. The exercise at the end of this chapter encourages you to identify those factors and add them to the list in completing a profile of your organization.

In looking at these definitions, you will notice that many assets are closely related to others. Your funds and people support your programs; your programs and relationships affect your reputation; and so on. This is important because when you decide to improve one asset, your actions can also affect others.

1. Workers

Your staff and volunteers are the organization's lifeline. They bring to it a combination of skills, knowledge, relationships, values, and aspirations that make the organization what it is.

2. Goals

Every organization has goals, or a mission. Goals state why the organization exists, or what needs it exists to meet, and what it is supposed to accomplish. Goals are an asset because they help determine direction and drive critical decisions about how to use your other assets.

3. Programs

Programs -- sometimes called services or activities -- are the expression of the organization's commitment. In one sense,

they are users of other assets. They require money, people, and supplies. They also are assets in their own right because they build your constituency and establish your reputation.

4. Network of relationships

No organization exists in a vacuum. There is a network of relationships with the Board, other organizations in competition or collaboration, clients, commercial enterprises, donors, public policymakers, community leaders, and others. The network is an asset because it helps build your constituency and gain support.

5. Reputation

Given the increasingly dynamic and competitive environment, a PVO's reputation can mean the difference between support and non-support by local governments, other local agencies, donors, and clients. This asset can be aggressively promoted to increase the organization's stature.

6. Financial assets

Financial assets include cash funds, supply stocks, and things the organization owns, like buildings, vehicles, and equipment. These assets allow you to operate. The way they are used affects both the quantity and quality of your programs.

7. Facilities and equipment

The organization's facilities and equipment are a major factor in its ability to deliver services and in the quality of those services. They also influence your reputation in the community since they affect both coverage and client satisfaction.

8. Information

You need information to monitor organizational performance and progress and anticipate future needs. When information assets are well developed, the right information is available to the people who need it when they need it. This increases your control over what the organization does and over the outside influences that can affect it.

9. Systems

Systems are ways to organize and control what your organization does. The most obvious ones are financial systems, information systems, management systems, evaluation systems, and the like. Your assets also include "informal" systems that affect how the organization operates. One of the most common is the informal communication system -- how information spreads through the organization -- that may be quite different from what the organizational chart shows.

10. Plans

Plans describe how the organization will use its other assets to meet its goals and fulfill its mission. They reflect careful evaluation of alternatives and thus represent the organization's "best guess" about what to do and how to do it. With good plans, you can anticipate how much effort the organization will put into various activities, and you know what you expect it to accomplish.

Deciding How to Focus Your Assessment

This exercise guides you in defining your organization's assets and assigning preliminary ratings to them, based on their importance to the organization and on their quality or productivity. The purpose is to help you develop a broad view of the organization and an initial understanding of its strengths. Remember that this is a preliminary exercise; you may change your views as you work through the rest of this manual. At the end of the assessment, you will re-examine your findings in deciding what kinds of change you want to achieve.

The exercise is a four-step process. You may work through it by yourself or invite other key staff either to participate with you or to review your findings.

Step 1. Identifying your organization's assets

Carefully review the list of assets shown on the worksheet that follows. Put a check mark in column A for every category of asset you believe the organization has. Also, reflect on your organization to see if you have additional assets. If so, enter them in the blank spaces at the bottom of the left hand column, and check column A.

ASSETS	Existence	Importance	Quality
	A	B	C
		5 = most important 4 = pretty important 3 = somewhat important 2 = not very important 1 = unimportant	5 = excellent 4 = good 3 = fair 2 = poor 1 = very poor
Workers			
Goals			
Programs			
Relationships			
Reputation			
Financial assets			
Facilities/equip.			
Information			
Systems			
Plans			

Step 2. Rating the importance of each asset

Using the scale of 1 to 5 shown in Column B, rank how important you believe each asset is to your organization. For example, if you run a community-based distribution program, your inventory and your vehicles are critical. Similarly, if your organization is heavily dependent on community support, your reputation and your network of relationships are critical. Note that you are rating each asset individually and independently.

Step 3. Rating how well the asset now serves the organization

Using the scale of 1 to 5 shown in Column C, rank the quality of the asset. In ranking quality, consider how well the

asset contributes to the organization. For example, if your personnel have the right combination of skills and abilities and demonstrate strong commitment to the organization and its programs, you would rate your workers high on the scale. It is important to note that you are rating current status here, not potential. These estimates of status will help you establish priorities for opportunities for change.

Step 4. Making a preliminary assessment

Study the completed worksheet carefully and look at the Assessment Table that follows.

IMPORTANCE

low → high

	3.	1.
high	Resources that might be directed elsewhere	Strengths that need to be maintained
QUALITY	4.	2.
low	Weaknesses that are not particularly damaging	Priorities that need improvement

Your strengths are the areas where both importance (column B) and quality (column C) are highly rated (Box 1 in the table). While these areas may not need change, they will need

maintenance. Thus, you will want to find out why these assets are strong so that you can continue to nourish them.

Your major challenges are where importance is high but quality is low (Box 2). These will probably be your priority areas for improvement.

Assets that are weak but relatively unimportant (Box 4) may merit no special attention right away, particularly if resources are scarce.

In the case of assets where quality is high but importance is low (Box 3), you may want to determine whether or not there are resources used here that could be more effectively and efficiently used elsewhere for developing more important assets.

Moving on

You now have a broad-brush picture of the organization's assets and their current value to the organization. The next step is to decide how to conduct your assessment and to begin examining each specific asset and how its contribution can be increased.

Chapter III.

Guidelines for Initiating and Conducting the Assessment

The self-assessment is a new look at your organization. It takes time, effort, and an interest in finding out where your strengths are and how you can take better advantage of what you have. Unlike an outside evaluation that focuses on things the evaluators want to know, this process lets you focus on what you want to know. This chapter helps you prepare for the assessment.

You have a lot of flexibility in choosing your approach. The assessment can be conducted by a senior manager with a broad knowledge of all facets of the organization, or by several senior managers. However, it is an ambitious task for one person alone, or for a small group. Also, sharing this experience widely will expose all participants to new information and ideas about the organization and stimulate their thinking about how to strengthen it. In addition, it will result in wider channels of communication that take better advantage of the creativity of all your workers. Finally, it will lend credibility to the conclusions reached and to subsequent decisions made about what to do next, with the entire organization committed to change.

Ways to Conduct the Assessment

A single team

One way to conduct the assessment is to assemble a single team that represents many parts of the organization. This team might include department directors, heads of service units, line workers who have a strong interest and a major stake in what the organization does, knowledgeable and experienced volunteers, or other key people who know and care about the organization. It is very helpful to mix service providers with administrators, support personnel with managers, and the like, because these groups often communicate infrequently and sometimes do not understand each other. The assessment process can help develop the common understanding that makes organizations strong.

Multiple teams

Another way is to initiate multiple teams, each of which would assess one or two different assets, and then have each team report to you or to the staff as a group. This option depends on how much time is available and how much special expertise you think will be needed. For example, you might want to limit the financial asset assessment mainly to finance staff who have the essential information and know how to interpret and evaluate it, but involve a few others with them to learn about this important aspect of operations. The multiple team strategy

will allow greater participation than a single team. It will also spread the time and effort more widely through the organization.

You Make the Decision

It is up to you to choose how you will proceed. In making this decision, it is important to consider a number of factors. The first is what you want out of the assessment process as well as what you want out of the assessment itself. If you want to use it to generate commitment and consensus within the organization, then the team approach will work best. This approach also ensures that the assessment considers the full range of information and thought that exists in the organization.

The second factor is who should participate. This depends in turn on how your staff is organized, how much time they can devote to it, and what you think they can bring to it. For example, if you have service units spread out through a wide geographical area, it is probably too costly and disruptive to bring lots of staff in for long periods of time. However, you could involve a few of these people for brief periods. This would argue for the multiple team approach.

The third factor is time. Most family planning PVOs already work long, hard hours, especially the direct service providers, and staff are reluctant to leave their posts for other duties. However, these individuals are a critical part of

your organization, and they want to participate in helping the organization grow. Again, a limited assignment to an assessment team might be workable.

Another factor to consider is knowledge and expertise. As you review the other chapters in this manual, you will see that some chapters are more "technical" than others. This is true particularly in the areas of finance and facilities and equipment. Therefore, you may want to have people with specialized experience take the lead. However, it is important to remember that these assets and decisions made about them affect everybody. When they are more widely understood, workers are much less apt to complain about what they thought were irrational or counterproductive policies and practices in these areas.

Finally, you may choose to mix your assessment methods. You may want to assess some areas yourself and delegate others to groups. You may want to assign a principal assessment team for a number of areas and assign the remainder to special teams. The choice is yours, because you know what your resources are, how the organization can best handle the process, and what you want out of the assessment.

Choosing Assets to Assess

This manual suggests an order for asset assessment, beginning with workers and ending with plans. Based on your self-analysis in Chapter II, you can choose to change the order and focus on the highest priority items first. You can also

omit areas that are unimportant or not relevant to your organization. Further, you can decide initially to focus on only one or two areas to see how well the process works for you, and then proceed further if you believe it is productive. One thing to keep in mind when you make this decision is the relationships between assets mentioned in Chapter II. If you do a limited assessment and then develop action plans in a particular asset area, your action plans may have unanticipated effects in other areas that you did not examine.

Preparing the Organization for the Assessment

Regardless of the method you select, it is important that everyone understand what the assessment is, why it is being done, how it is being done, and how it will be used. As the manager, it is up to you to introduce it in a way that stresses the positive things that will come out of it. In preparing for the presentation, it helps to be aware of several things you will face.

First, all organizations initially resist change. Even workers who complain bitterly about certain aspects of the organization tend to prefer to keep what they are familiar with rather than begin something new. Second, a process like this often stimulates unreal expectations. While people resist change, at the same time they expect quick results and substantial improvement in areas they believe are important. The assessment may not meet these expectations. Third, there

are always some people who feel that an organizational self-assessment is a way to "get rid of" people or to direct the organization less toward quality of service and more toward "systems" and "efficiency", at the expense of clients.

It is your job to present the process in a favorable light. Here are some ideas you might incorporate into your presentation:

IDEAS TO HELP YOU

1. If the team approach is used, you can stress the fact that many people will be involved in looking at the organization and making decisions about priorities for change. If another approach is used, you can tell workers in advance that they can meet with you to discuss and react to results.
2. This is a self-assessment for the organization's own purposes, not an outside evaluation. Therefore, you can reassure people that nothing negative will happen as a result of the findings. The purpose is not to find fault, but to see how to take better advantage of assets that exist, and to identify opportunities for change. It may be helpful to talk about some of the priority areas you identified in Chapter II and explain how changes in these areas will improve the work environment and the quality of services to your clients.
3. The self-assessment is not an immediate "cure." It stops short of action planning. What it does is prepare the organization to begin action planning in an informed way. You can reassure your staff that the process identifies opportunities for change, but does not dictate exactly what those changes should be or how they should be achieved.

4. If your organization is facing something new, like additional or expanded programs, you can capitalize on that opportunity by pointing out that the assessment can help the organization decide how to take on new roles and responsibilities. You can easily show that what comes out of it will help everyone respond to the new challenges.

5. The assessment involves many worksheets that document the findings and the thought process behind them. You can offer to share these with workers before decisions are made about what happens next.

6. The assessment process takes time. Even though people may support it initially, they may become "nervous" as time goes on, wondering about what the findings are and often anticipating "the worst." To counteract this, you may want to announce that you will report periodically on how the assessment is going and present preliminary findings for open discussion.

No matter how well you make the presentation, there are bound to be many questions from your staff. You should encourage people to ask these questions and carefully answer each and every one as best you can. If you are considering the team approach, you might also allow workers to volunteer as team members.

Depending on the size and structure of your organization, you may want to present the assessment first to senior managers and supervisors to gain their understanding and commitment. They will then support you when you introduce the process to the rest of the organization.

Next Steps

The presentation will create expectations on the part of the staff, so it is important to get started quickly. Based on the decisions you have made about how to conduct the assessment and what to assess, you should make sure that time, space, and materials are available for all those involved.

Chapter IV.

Assessing the Organization's Workers

This chapter takes you through an assessment of your workers from various perspectives -- how they are organized, what their talents are, how well they perform and why, and how well the organization develops and uses their talents. It covers both staff and volunteers.

About Workers

What workers bring to the organization

Every worker brings many things to the organization. Some are easily described:

- skills needed to run the organization and its activities
- knowledge needed to run the organization and its activities
- relationships with the community, public officials, donors, clients, and other local family planning organizations
- commitment to the organization's goals and values that match those of the organization
- aspirations to advance, make an ever greater contribution to the organization, and enjoy satisfaction from the job

In addition, every individual brings qualities that are not reflected in a record of education and experience, and these are

not easily measured. They include intuition, a sense of humor, compassion, independence, an entrepreneurial spirit, common sense, integrity, and others. They make a difference in how, and how well, the worker performs the job. It is hard to define and assess these qualities directly. However, you should keep in mind those that are desirable for your organization as you begin to assess the strength of your worker assets.

Making the most of what workers bring to the organization

It is up to the organization to take advantage of everything workers bring to it, and to help workers grow. There are many ways to do this. One is to make sure that workers can express and use all of their talents. This means placing workers in the right jobs, constantly encouraging them to do their best, rewarding their performance, and enriching their jobs by allowing them to participate periodically in activities that go beyond the routine of their regular jobs. Another is to help them develop additional talents that they can apply in the organization. This means training, counseling, exposing them to different parts of the organization, and encouraging them to learn on their own. Yet another is to involve workers in thinking creatively about organizational challenges and suggesting ways to improve. This means gathering people together for discussions and listening carefully to what they have to say.

Every organization has its own methods. The point is that workers are an asset, and there are things the organization can do to increase the value of this asset.

What is special about family planning PVO workers?

PVO workers are known everywhere for their pioneering spirit and their commitment to service. There are some other common differences between family planning PVO workers and others that you should keep in mind during the assessment.

First, many managers didn't plan to manage. They are professionals, like doctors, nurses, and midwives, who are in managerial positions because the organization needed them. These people generally do not bring managerial training or experience to the job, and have learned by doing. The same is true for supervisors. This is important to remember when you begin to look at how work is organized and the fit between workers and the positions they are in, because the managerial and supervisory jobs in your organization may look different from the same jobs elsewhere.

Second, many managers work part-time on management and part-time on other "service" or "program" tasks with their colleagues. Thus, they have two roles, and this, too, influences the organization of work at PVOs.

Third, for many PVOs "success" is hard to measure because goals -- and the results of activities and services -- are hard to quantify. The same is true at the individual level. Thus,

workers are often unsure about what they are supposed to achieve, and supervisors face special challenges in making judgments about their performance.

Fourth, because PVO salaries are often lower than those of other organizations and because of the environment in which many family planning PVOs operate, it is difficult to compete for, recruit, and keep highly qualified staff. The potentially high turnover rate often affects job structure, with simple, limited jobs established so that new people can be brought on board quickly and without excessive training. Yet these positions may fail to interest and motivate those who stay, so it is important to achieve a balance between these two competing factors. In addition, PVOs need to develop other rewards, such as an exciting, supportive work environment, to compensate for low salaries.

Finally, most PVOs use both staff and volunteers. These two groups share many things -- their desire to serve, a multitude of talents, the need to be supported and rewarded, ambition, the need for leadership, the need for training and supervision, and an interest in participating in preparing for the organization's future. There are also some important differences that affect the relationship between the organization and the workers. Because they are donating their services to the organization, volunteers may feel they are entitled to special privileges. Further, some volunteers may also be Board members and as such may have an ambiguous relationship with staff. Also, since most volunteers are part-

time workers, their jobs sometimes need to be specially structured. These differences are important, but volunteers can be developed and managed by an organization that chooses to capitalize on them.

Preparing for the Assessment

The first step is to assign responsibility for these activities. If you are using a team or otherwise delegating it to others, you should brief them on your understanding of the process and what you believe the organization should get out of it. Team members might include the individual with overall responsibility for personnel administration, representatives of the largest groups of workers, representatives from different clinics or other service locations, and volunteer workers.

This is not a statistical exercise that involves detailed review of records. While those kinds of activities can be valuable, they are beyond the scope of this manual. The Appendix lists books and other materials that can guide you in analyzing worker statistics. This assessment can take advantage of some simple documents that may be available. If your organization has these, they should be gathered before you begin. The following are recommended:

- an organization chart
- job descriptions
- a sample of personnel files to indicate what workers bring to the job

- staff work schedules
- performance evaluation reports
- other forms used in supervising and managing workers

Also, there are a number of worksheet formats shown in this chapter. These should be drawn on large pieces of paper and posted so that all participants can see and work on them together.

Assessing the Organization's Worker Assets

This assessment helps you study six questions:

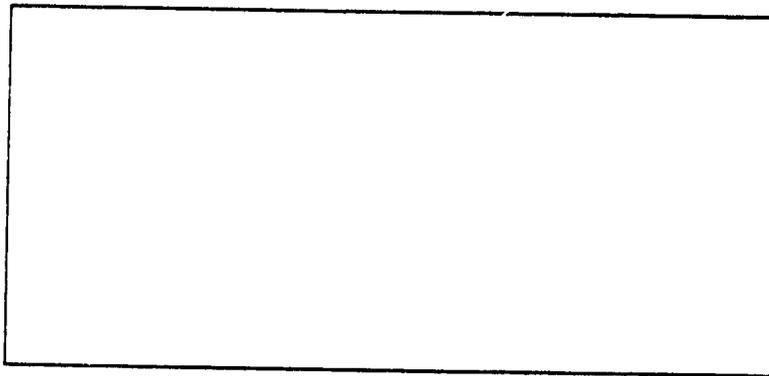
- (1) Are workers organized appropriately for the tasks the organization has to perform?
- (2) Are workers placed in jobs that take advantage of their talents?
- (3) How well do workers perform, and how can you tell?
- (4) Are volunteers in jobs that take advantage of their talents?
- (5) How well do volunteers perform, and how can you tell?
- (6) How well does the organization use the creativity of its workers?

In exploring these questions, you will identify areas where the organization is strong and examine how those strengths can be used to achieve change in other areas. The exercises below can be conducted by an individual or by a team.

EXERCISE 1: ASSESSING HOW WORK IS ORGANIZED

The purpose of this exercise is to see how well the organization of your workers fits what the organization does. This is just a broad picture to begin with. You will analyze it more closely in the exercises that follow.

The easiest way to complete the exercise is to post a large copy of your organization chart on the wall for review. (If you do not have a chart, then this is the time to draw one.)



First examine the chart to see whether or not it is current. If not, make whatever changes are required. Make sure there is some indication of how many people are in each position. If volunteers do not appear on your chart, add them in next to the staff they work with or assist, and estimate their numbers. Some may work only part-time. In this case, count a half-time worker as $1/2$, a quarter-time worker as $1/4$, and so on.

Now examine the way your workers are allocated in functional groups. Explore the following kinds of questions:

1. In general terms, do we devote the highest numbers of workers to our priority tasks? If not, is there a reason? If there are differences of opinion among team members, discuss them fully.
2. Are there areas that are overstaffed or understaffed? Mark them with an "O" or a "U" on the chart.
3. Look at your supervisors. Do you feel there are too many, too few, or a workable number? Why?
4. Are there tasks the organization does that are not reflected on the organization chart? If so, list them.
5. Are there tasks the organization should do but cannot be done the way workers are organized now? If so, list them.
6. Does today's organization chart match today's functions and tasks? If not, where are the inconsistencies?

Examine these issues in detail. Summarize the strengths of the structure in terms of using workers efficiently to get the important jobs of the organization done. Then draw up a separate list of problems that you see.

Strengths	Problems

Analyze those problems to see why they might exist, and identify things that you believe can be changed. Record your findings and conclusions carefully for use at the end of this exercise series.

FINDINGS AND CONCLUSIONS

**EXERCISE 2: ASSESSING THE FIT BETWEEN
STAFF WORKERS AND POSITIONS**

The purpose of this exercise is to see whether your staff workers have the necessary preparation, qualifications, and skills to perform their jobs successfully. In other words, you will determine how well the people match the positions.

Step 1. Defining job requirements

Enter major job titles on the "Staff Worker-Position Comparison Table" that follows.

STAFF WORKER-POSITION COMPARISON TABLE			
JOB TITLE	JOB FUNCTIONS (A)	SKILLS & OTHER CHARACTERISTICS NEEDED (B)	EXISTING SKILLS & OTHER CHARACTERISTICS (C)

If you have job descriptions, you may be able to use them to list the functions of workers in that position (column A) and the skills and other worker characteristics needed for the job (column B). It is important to focus on major categories of tasks rather than on each and every function the worker has. If you do not have job descriptions, take a few minutes to describe each position and develop brief lists for entry on the chart.

Step 2: Determining what your workers bring to the job

In this step, you look at your staff workers to see what preparation, qualifications, and skills they bring to the job so that you can later compare what you need to what you have. You will enter this information in column C.

You may be able to draw on personnel files if you have them to find this information. Also, your organization may have a list of "entry requirements" for each job that you could use. However, when you look at the list, consider whether or not workers meet those requirements. If not, then adjust the list accordingly.

When no reliable documentation exists, develop lists of skills, knowledge, experience, and other attributes you believe your workers bring to each job.

Step 3. Comparing your staff workers to what you need

In this step, you compare column B with column C to see how well your staff workers fit the jobs they are in. Taking each job in turn, analyze the two columns for matches and mismatches. The latter may include underqualified workers, overqualified workers, or workers whose qualifications indicate they should be in a different job altogether. Summarize your conclusions in writing. Also try to assign a priority to each problem identified.

MATCHES	MISMATCHES	PROBLEM	PRIORITY

Review the conclusions carefully. See if you can determine why some of the mismatches exist. Is it because there is no local training in the professions you need? Because the organization doesn't recruit widely enough? Because some positions offer no advancement opportunities? In considering these kinds of questions, look at where the matches are to see why there are differences. Identify opportunities for change and save your findings for review at the end of this chapter.

FINDINGS AND CONCLUSIONS

EXERCISE 3: ASSESSING STAFF WORKER PERFORMANCE

In this exercise, you are assessing two things: (1) how well workers perform and (2) how the organization evaluates worker performance.

Step 1. Seeing what kind of information is available

In this step, you identify what kind of information the organization has to assess staff worker performance, and where that information is. While statistics are important, such as number of households visited or number of new acceptors enrolled, worker performance may also depend on non-statistical indicators, like reputation in the community, ability to work cooperatively with others, and the like. Therefore, do not restrict your attention to things that can be measured by numbers alone.

First, using the format that follows, list on the upper half of the worksheet all the kinds of information now collected and used, and where it comes from. For example, number of households visited may come from a self-report, while assessments of ability to work with clients may come from a supervisor's report, verbal or written.

Second, develop a list of other information that is available, but not currently used. This might include client feedback or external evaluations. Enter it on the lower half of the worksheet.

Step 2. Estimating staff worker performance

The purpose of this step is to make a broad assessment about how well the workforce serves the organization and its clients. Although you may review whatever documentation is available in terms of performance evaluation reports, a thorough statistical analysis is not necessary.

Using the format that follows, enter job categories in column A, and then rate performance, on a general basis, in column B using the scale of 1 to 5 on the worksheet. Be as objective as you can. In the next step, you will be studying why performance may be high or low. At this point, you are focussing only on what it actually is.

STAFF WORKER PERFORMANCE ESTIMATE WORKSHEET	
	5 = outstanding 4 = very good 3 = acceptable 2 = substantial 1 = very poor
JOB TITLE (A)	PERFORMANCE RATING (B)

Step 3. Analyzing staff worker performance

Now is the time to examine why workers perform at the levels you determined. Develop two lists: (1) things the organization does to encourage performance and (2) things the organization does to discourage performance.

To encourage

To discourage

Think carefully about how people act towards one another, physical working conditions, opportunities for reward or advancement, frequency and quality of supervision, the fit between workers and jobs that you reviewed in Exercise 2 -- the broadest possible range of factors you can come up with.

Next, develop a list of things the organization could do to motivate workers and encourage their performance.

What could be done to encourage performance

This might include eliminating some of the "negatives" you have just identified as well as introducing new ideas. With regard to new ideas, stay as open-minded as possible, and do not reject

anything because you believe it is impossible or impractical. At this point, you are just developing options, not evaluating whether or not they are realistic options for your organization.

Step 4. Identifying opportunities for improvement

Using all the materials you have developed, summarize your findings in two lists, each in priority order: (1) categories where worker performance needs improvement and (2) things the organization can do to stimulate improved performance. Save these lists for later review.

IMPROVEMENTS NEEDED

WHAT THE ORGANIZATION CAN DO

EXERCISE 4: ASSESSING THE USE OF VOLUNTEER WORKERS

The purpose of this exercise is to see how well volunteers fit the positions to which they are assigned. Follow the directions for Exercise 2, using the "Volunteer Worker-Position Comparison Table" format that follows.

VOLUNTEER WORKER-POSITION COMPARISON TABLE			
JOB TITLE	JOB FUNCTIONS (A)	SKILLS & OTHER CHARACTERISTICS NEEDED (B)	EXISTING SKILLS & OTHER CHARACTERISTICS (C)

EXERCISE 5: ESTIMATING VOLUNTEER WORKER PERFORMANCE

The purpose of this exercise is to see how well volunteers perform in their jobs. Follow the instructions for Exercise 3, using the "Volunteer Worker Performance Information Worksheet" and "Volunteer Worker Performance Estimate Worksheet" formats that follow.

VOLUNTEER WORKER PERFORMANCE INFORMATION WORKSHEET	
INFORMATION	SOURCE
1. Information now collected and used	████████████████████ ████████████████████ ████████████████████
2. Information available but not used	████████████████████ ████████████████████ ████████████████████

VOLUNTEER WORKER PERFORMANCE ESTIMATE WORKSHEET

5 = outstanding
4 = very good
3 = acceptable
2 = substandard
1 = very poor

JOB TITLE (A)	PERFORMANCE RATING (B)

EXERCISE 6: ASSESSING HOW WELL THE ORGANIZATION USES ITS WORKERS

Up to now, you have been focusing mainly on workers in terms of their functional positions in the organization. You have also considered how the organization can affect how well workers perform in these positions. This exercise helps you look at another aspect of the relationship between workers and the organization -- the extent to which the organization stimulates and uses its workers' ability to think about new directions, new approaches to doing things, and new ways to strengthen the organization's vitality. The objective is to determine how well the organization takes advantage of the creativity within it.

This is a very large question, and it deserves a lot of thought and discussion. This exercise suggests some practical ways to explore it. However, this is also the time to use your intuition, your "gut feeling" about how things operate in your organization, and to be creative yourselves in identifying better ways to use the many talents of your people.

One practical tool is to refer back to your organization chart and draw lines on it showing how people actually communicate, not how they are supposed to communicate or how they report. Determine whether the communication between supervisors and workers is one-way or two-way. Also examine whether peers communicate with each other, within their units and between units. Study the completed diagram. See if the communication lines that now exist allow the creativity of individuals to be discovered and used.

Organization Chart

Another practical tool is to rate the organization on characteristics that promote expression and use of ideas. For example, there must be opportunities to exchange and discuss ideas. Also, workers must believe that people will listen to them when they express ideas. Further, there must be a spirit of "give and take", where a new idea can be accepted in part or on a trial basis. Develop a list of characteristics that you believe promote expression and use of creativity. Next, rate your organization on the scale of 1 to 5 shown on the worksheet that follows.

- 5 = highly developed
- 4 = well developed
- 3 = adequate
- 2 = poorly developed
- 1 = undeveloped

Characteristic

Rating

When you have fully explored the question, develop a summary statement of the organization's ability to use its workers' creativity and a list of areas that need improvement.

<u>Present ability</u>	<u>Improvement targets</u>

Summarizing Opportunities for Improvement

You now have a wide-ranging picture of how well developed the organization's worker assets are, and how well the organization uses those assets. This is the time to review all the information you have and summarize strengths and opportunities for improvement. Some areas are more critical than others, and some actions will have greater effects than others. Reflect carefully on all that you have done, and develop a list of opportunities for change, in order of priority, indicating what the expected benefits will be.

OPPORTUNITIES FOR CHANGE	BENEFITS

Chapter V.

Assessing the Organization's Goals

About Goals

A goal defines what the organization exists to do, or what its role is. Some organizations have a single goal; others have several. Goals may also be called "missions" or "purposes". They are usually written down in a charter, articles of incorporation, or other documents that established the organization. Usually they were developed when the organization was founded and may not have been reviewed since that time.

Why goals are assets

Regardless of what goals are called in your organization, they are an asset because they can be used in many ways:

- (1) They tell people within and outside of the organization what the organization does. In effect, they give your organization an "identity" that distinguishes it from other organizations. This identity is important in developing your constituency and establishing your network of relationships.
- (2) Goals guide you in making decisions about what kinds of services, activities, and programs you will offer. By comparing what the organization does with what it is supposed to do, you can determine the fit between your activities and your goals.
- (3) Goals help you decide how to allocate and use your other assets. Usually resources are limited, and the organization

cannot do everything it would like to do. By comparing competing demands with your goals, you can establish priorities and determine what is most important.

(4) Goals unify your workers and your supporters. They help everyone understand the purpose of the contribution they are making and establish a common sense of commitment.

(5) Goals help you establish targets or objectives. These are relatively short-run statements of concrete ends you want to achieve.

Using goals as assets

Maintaining and making use of this asset are not easy. There are lots of pressures on family planning PVOs to change goals frequently, to adopt goals that are so broad they permit virtually everything and provide no guidance at all, or essentially to ignore their own goals and respond instead to the needs, interests, and goals of other organizations. Changes in government policies can make it easier or harder to achieve the organization's goals, and are beyond the organization's control. Donors may predicate their support on the organization's willingness to develop a program that is inconsistent with the goals, or a low priority in relation to them. Most important, the organization is never really fully "independent" from its constituent groups, and one or more of these may exert influence on the organization from time to time to change or depart from its goals.

Assessing your organization's goals and increasing your

awareness of their potential value will help you deal with these kinds of pressures and establish goal statements that are helpful and workable within your environment.

Characteristics of useful goal statements

There are many factors that determine how strong an asset your goal statement is, and to what extent you can use it. Some of these factors will be more applicable and easier to incorporate than others. Each organization needs to determine its own goal statement standards, based on the particular environment in which it operates and the delicate balance that exists between the PVO, local government, and the community at large. A preliminary review of these factors will help shape your assessment.

A strong goal statement is clear, specific, and functional. It defines what the organization is trying to achieve and generally how it will do so. Its language is clear to everyone who reads it. It describes both the organization's role and the people it serves.

A strong goal statement distinguishes your organization from others. Given the increasing competition for funds, your supporters need to know what your unique role is in your service community.

Many goal statements reflect the past. They were developed when the organization was founded, and they do not reflect the many changes that have taken place. A strong goal statement is

current. It also reflects your estimate of what the future holds so that it will remain as valid as possible. This is hard to predict, but continuously changing goal statements upset the organization instead of stabilizing and guiding it.

The scope of a strong goal statement is both sufficiently narrow and sufficiently broad. Breadth increases the number of constituent groups the organization is likely to attract. However, overly broad goals lead to expectations that the organization will have far more programs and services than it can control and afford. A narrower statement, on the other hand, can limit your potential for support and your flexibility to respond to change. Flexibility is especially important for family planning PVOs that must be adaptable in the face of environmental changes. Therefore, a strong goal statement achieves a balance based on the specific needs and interests of the organization.

Preparing for the Assessment

The first step is to assign responsibility for goal assessment. The team approach may be especially useful here, since one of the things you will be examining is the extent to which there is agreement within the organization about its goals. Team members might include representatives of various staff units at different levels of skill and responsibility, long-term volunteers, and Board members. You might also wish to include representatives from the community at large.

If you have a written goal statement, sufficient copies should be made available to all members of the team.

Assessing the Organization's Goals

If your organization's goals are documented, proceed with Exercise 1. This exercise helps you (1) assess how useful your goals are and (2) identify opportunities for change. If there is no written goal statement, Exercise 2 helps you develop one, considering the same questions presented for review in Exercise 1. It is not unusual to lack a written goal statement, so do not be concerned if your organization does not have one.

Both exercises assume the use of a team and are therefore presented as structured discussions. If you are conducting the assessment by yourself, then use the exercises to guide your own thinking.

EXERCISE 1: ASSESSING WRITTEN GOAL STATEMENTS

Post the goal statement on a large piece of paper so that all participants can review it together. If the statement is very long, select key words and phrases that summarize its content.

<p>Goal Statement</p>

What you will do in this exercise is review the factors that determine how well the goals serve the organization.

Discuss the following series of questions:

1. Is the goal statement clear, specific, and functional? Does it tell you what the organization does and whom it serves? Do you believe others outside the organization interpret it the same way you do?
2. What groups have a stake in the organization's goal statement, and why?
3. Do the goals give the organization the kind of identity it wants and needs to have?
4. Is the goal statement current? If not, how have the goals changed, and why? Were the changes initiated by the organization, or were they influenced from outside the organization?
5. Can the goals be used to make decisions about programs and services and about how other assets should be allocated? Are they used for this purpose? If so, who uses them?
6. Do the goals help you in establishing objectives or concrete things you want to achieve?
7. Is the goal statement too narrow or too broad? In what ways?
8. Is there agreement about the goals among the following groups: staff, Board members, clients, and volunteers? List areas of agreement and disagreement.
9. Based on your assessment of how the environment might change in the future, will your goal statement remain useful and relevant?

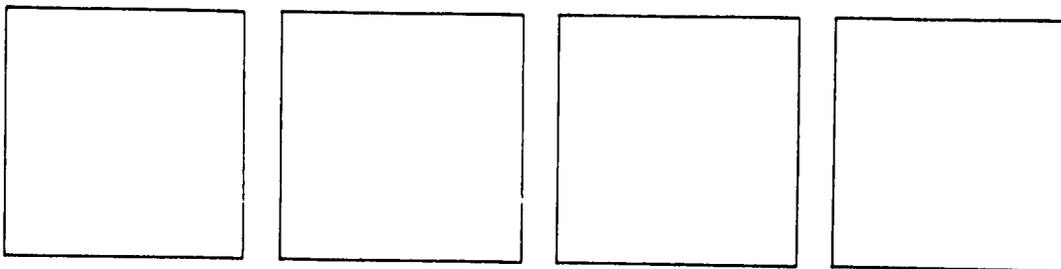
Record the results of your discussion. If there are significant differences among members of the assessment group, make sure that these are clearly stated.

Results of discussion

EXERCISE 2: DEVELOPING AND ASSESSING A GOAL STATEMENT

People in organizations without written goal statements usually have an understanding of what the goals are. Sometimes it is a common understanding. More often, groups of people have different ideas about what the goals are. These differences are often the root of inconsistencies in organizational directions and conflicts on decisions about the organization's future.

To begin this exercise, each individual should take a few moments to think about and record his or her own interpretation of the organization's goals on a separate wall chart.

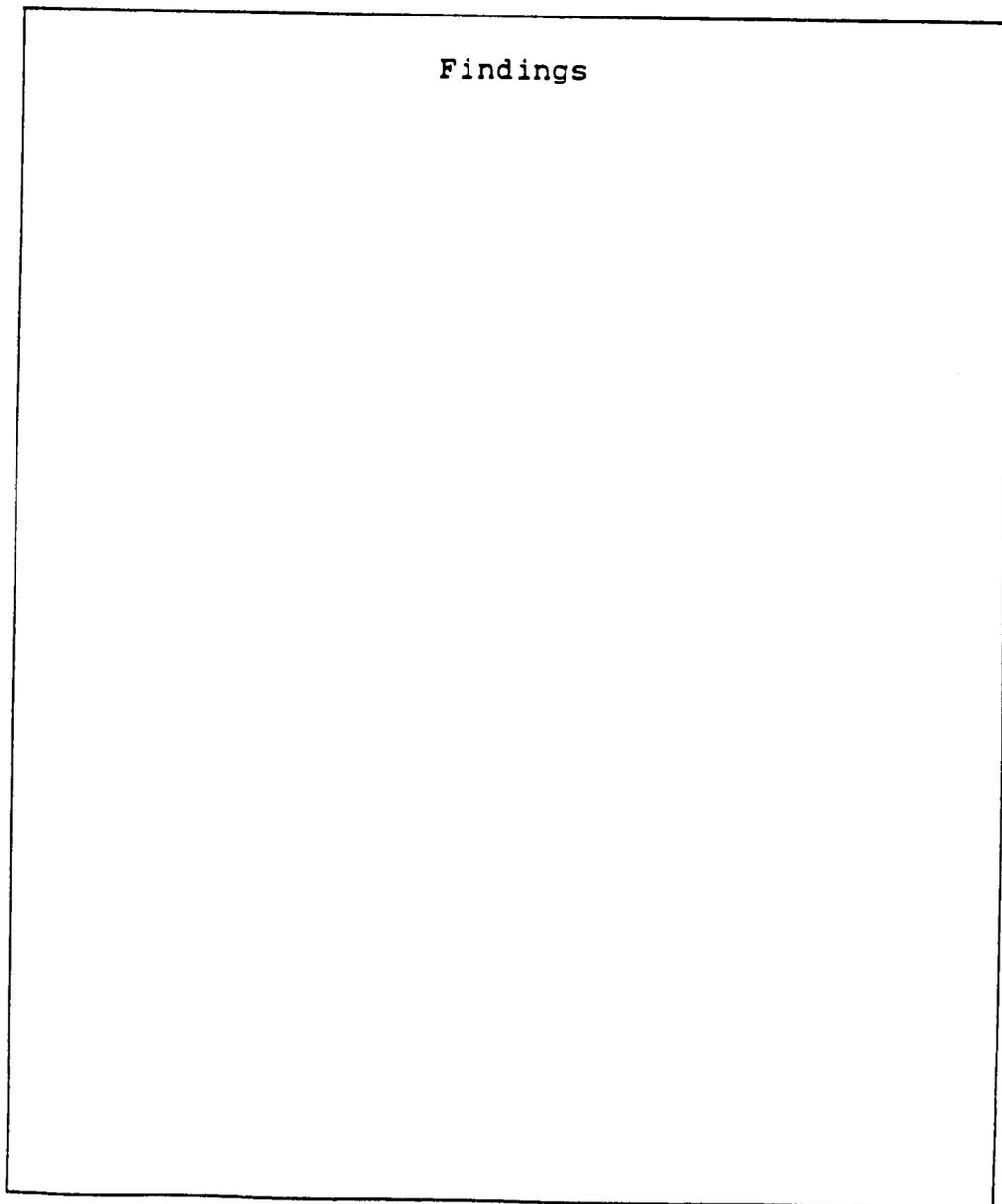


Review these charts to see what the commonalities and differences are. Resolve the differences if you can, so that the group can agree on a single statement. If this cannot be

done, then develop two or three statements that reflect the views of the group.

If you have reached agreement on a single statement, review that statement in terms of the questions listed in Exercise 1. If several statements remain, examine each of them in the same way. Carefully record your findings.

Findings



Summarizing Opportunities for Improvement

You have now considered how well your goals reflect the organization's purpose, and how well they serve the organization. Review their strengths and identify areas in which you believe they can be improved. Also, indicate what the benefits of those changes will be.

Opportunities for Change	Benefits

Chapter VI.

Assessing the Organization's Programs

About Programs

Programs are the concrete expression of the organization's commitment to serve. Your organization may call them services or activities. In any case, they are the means to achieve the organization's goals and can complement the asset value of your goals. In this sense, programs are something that the organization gives to or does for the community, and the emphasis is on serving others.

Programs as assets

Programs can also serve the organization. From this perspective, they are an organizational asset. For example, strong programs that satisfy the people they serve make the organization popular. This popularity results in power and influence in the community. It also helps gain financial support, because many donors want evidence that the organization's clients like and use its programs before providing funding. Strong programs also earn the attention and respect of professionals and others in the community. This gives the organization stature, which again promotes its power and influence. It can also stimulate other organizations to

collaborate with you, thereby improving your organization's network of relationships. Further, programs affect the morale of workers. When clients are satisfied, workers are happy in their jobs and are motivated to use all of their skills and abilities on behalf of the organization. Finally, programs are the building blocks of the organization's identity. They express the organization's role, distinguish it from others, and establish its credibility. They speak for the organization. This chapter starts you thinking about how you can control what they "say."

Factors that influence the asset value of your programs

Most organizations are very concerned with assessing how well programs serve recipients. This chapter helps you focus on how well the programs serve the organization. Clearly, these two aspects are closely related. They both depend largely on how strong the programs are, and how well the organization's programs achieve its goals. However, the value of programs to the organization requires looking at them from a different perspective.

Many things influence how well programs serve the organization. How you choose to use and control them depends very much on your own environment and on the organizational image you wish to project. For example, if political, cultural, or other constraints require a relatively low organizational profile, then you might not want to use the potential of your programs

actively to promote the organization. On the other hand, where a high profile is desirable, your programs can "market" the organization and establish for it a leadership position in the kinds of family planning services it provides.

There are a number of common factors that affect the asset value of your programs. These are described below. In the exercise section at the end of this chapter, you will decide which ones apply in your setting and to what extent they characterize your programs.

1. Degree of consistency with organizational goals --

Programs that work directly and in concert toward achievement of organizational goals speak to the credibility of the organization. An organization that says one thing and does another is taken less seriously and understood less well than one that consistently works toward the same ends. This does not mean that programs should be inflexible or that all programs have to be the same. In fact, flexibility and diversity may be desirable qualities you want the organization to show. It simply means that programs should reflect common directions and provide a clear, unified image of what the organization stands for.

2. Extent to which programs take advantage of other assets

-- At the start of the assessment process, you noted the relationships between your organizational assets. These relationships are especially clear in the program area, because

your ability to deliver good programs depends on the quality of your other organizational assets and how well you use them -- workers, supplies, facilities, money, relationships, and others. If you completed Chapter IV, you reviewed the match between your workers and the positions they hold. Later chapters offer an opportunity to look at other assets. What is important to note here is that programs that use these other assets well provide quality services to recipients and in turn become assets to the organization.

3. Extent to which programs are identified with the organization -- Your programs can market and promote your organization, but a popular, well respected program serves the organization only when people know whose program it is. There are many ways to make sure that people who receive services know who is delivering them. Where a high profile is acceptable, your efforts in this area can be vigorous and overt. Even if you elect to maintain a low profile, your programs can quietly establish a constituency that knows what the organization is, appreciates what it does, and supports its efforts.

4. Degree of emphasis on quality -- There are great pressures on family planning PVOs to pay attention to quantitative measures, to show consistent increases in numbers of acceptors, for example, or to open new or extended facilities. These gains are important. However, quality is equally

important. You want your services to be "right," and you want each client to be well treated. You show an emphasis on quality through careful monitoring and control of your programs and by responding to what your monitoring efforts tell you.

5. Degree of responsiveness to recipient needs -- Family planning PVOs everywhere have an excellent reputation for developing and delivering programs that attract target recipients and meet their specific needs. This is because most PVOs have a community or grass roots orientation, and they are in touch with the important attitudes and other factors that affect acceptance of services. These factors change over time. Some of the changes are obvious, and others are very subtle. It is not easy to finetune programs in response to them, but doing so makes the organization a well respected and powerful force in the community. Careful monitoring and attention to your clients increase your ability to respond in this way.

6. Record of achievement -- This is the most powerful indicator of a program's strength. When it achieves what it set out to achieve, it shows that the organization is committed and competent and firmly establishes its credibility. It is up to the organization to make its record known and to use that record to motivate workers, enhance its reputation, and broaden its base of support.

Preparing for the Assessment

The first step is to assign responsibility for the assessment. If you are using a team, you should meet with team members to review the concept of how the programs, services, or activities serve the organization as well as recipients so that participants understand how to approach this task. Team members might include a selection of service providers, including volunteers, and administrators who make major decisions about the kinds of programs the organization will offer. You might also invite a community representative, a local professional from another organization, or a Board member to participate. This individual can help assess how the programs and the organization's use of them are perceived on the outside.

Although this assessment focuses on the asset value of programs to the organization rather than to recipients, you may be able to make use of evaluations that have been conducted from the other perspective. Therefore, it will be helpful to assemble any program evaluation documents you may have. Other articles or reports that describe or comment on the organization's programs can also be used. These documents will be useful in assessing the organization's reputation in Chapter VIII as well.

Assessing the Organization's Programs

This set of exercises guides you in defining your programs, identifying the factors that affect their asset value, and assessing how well the programs serve the organization. It assumes the use of a team but can be conducted individually, using the same thought process.

EXERCISE 1: DEFINING PROGRAMS

Your organization may have only one kind of program, such as community-based distribution, or several kinds, such as social marketing, distribution, and information, education, and communication (IE&C). Alternatively, you may have a single program with many components. In addition, you may have a single location or several. These factors affect how you will choose to list your programs.

The purpose of this exercise is to identify "program units." Program units are programs, components of programs, or locations that are clearly identifiable, relatively independent, can be used as assets by the organization, and can be directly affected by strategies for change you identify later. For example, if you have several community-based distribution programs and they are operated quite differently and/or independently, you may want to consider each one separately. Similarly, if you have a number of facilities, you may want to

consider each one individually. If you have a single program, you may want to divide it into its components and assess each component independently.

It is up to you to decide how you will classify and list your programs. Review your program spectrum to decide what these units should be. Then list each one vertically next to the numbers on the left side of the "Program Assessment Worksheet" format that follows.

PROGRAM ASSESSMENT WORKSHEET								
								5 = very high 4 = high 3 = moderate 2 = low 1 = very low
								FACTORS
PROGRAMS								/
1.								
2.								
3.								
4.								
5.								
All programs								

EXERCISE 2: IDENTIFYING FACTORS THAT AFFECT PROGRAM ASSET VALUE

The introduction to this chapter suggested a number of things that affect how well programs serve the organization. Review that list and discuss how significant each factor is in terms of your local organizational environment. In addition, consider whether there are others that are applicable and should be added. Write factors you select in the slanted areas across the top of the "Program Assessment Worksheet" you initiated in Exercise 1.

EXERCISE 3: ASSESSING THE ASSET VALUE OF YOUR PROGRAMS

Carefully consider the first program unit on the worksheet and rate it for each of the factors listed using the scale of 1 to 5 shown. Then proceed with each of the other program units in turn. These ratings should reflect current status; you will consider potential for improvement at the end of this exercise series.

If you have more than one program, consider all of them as a whole when you have finished the individual program review. Rate this "global" picture of your organization's programs on the same scale at the bottom of the worksheet. In making this assessment, consider the mix of programs in terms of each factor, but do not simply average the numbers assigned earlier. The purpose of this step is to see how strong your entire program spectrum is, without regard to its individual

components. You may have found some weaknesses at the program unit level but rate your total program spectrum highly. Or the opposite may be true, where each program unit appears strong but there is something lacking in the combination. These discrepancies are important, because they will affect later decisions about how to change.

Identifying Opportunities for Improvement

The concept of programs serving the organization as well as clients may be new to you. You have now examined it carefully in terms of the specific activities your organization undertakes. Starting with your overall assessment of all your programs together and then moving to each program in turn, identify areas that could be improved so that your programs will make a stronger contribution to the organization. List these in priority order, indicating which programs are involved and what you expect the benefits of change will be.

Opportunities for change	Benefits

Chapter VII.

Assessing the Organization's Network of Relationships

About Relationships

Many family planning PVOs were pioneers, offering family planning services for the first time to people who had no other access to them. The organizations were in large part on their own, with little competition or cooperation from others. The family planning environment is different now, and it continues to change. Its complexity varies greatly from one country to another, but the number of players is generally growing. It is common now to find at least governments, PVOs, donors, schools and universities, private health care providers, and commercial organizations involved in some aspect of family planning. There are also religious, political, and community groups that are not directly involved in family planning, but have a strong influence on the kinds of programs family planning PVOs can promote. The media, too, are sometimes important players since they can influence public attitudes and behaviors regarding family planning.

Both PVOs that have been operating for many years and those established more recently are working to establish their place in this environment and to develop and maintain a variety of linkages with other organizations. These linkages are assets.

Used well, they strengthen the organization's position, make it easier to achieve goals, and help the organization take advantage of the strengths of its other assets.

Kinds of relationships

There are many kinds of relationships that can exist. For example, there are collaborative relationships where organizations join together to make sure their services are complementary or to advocate for positive public policy on family planning. There are functional relationships where one organization provides a service to another, such as training, warehousing, transport, or financial auditing. There are professional relationships where one organization consults to another, serves on the Board of another, or works together with other organizations on a coordinating council. There are cooperative relationships where organizational representatives simply keep in touch with each other to discuss things of mutual interest. There are financial relationships, where one organization is funded by and accountable to another. Finally, there are political or representational relationships where the objectives are to show that the organization is an important part of the local family planning service system and to promote its views and interests.

The nature of relationships between organizations is generally fluid. A linkage may be collaborative at one time and functional at another. It changes as the environment changes.

It also changes as the organization grows. Developing and maintaining the network take a great deal of effort. This effort pays off because of the tremendous potential asset value of strong relationships. The following are some examples of how these assets can be used:

- Strong relationships with other professional organizations, such as health provider groups and educators, can be a source of technical expertise. They also show others that the organization is accepted by these groups and is respected for its own professionalism.
- Collaborative relationships with community leaders and organizations help build the credibility and respectability of the organization. This acceptance makes it easier to work in the local environment.
- Strong relationships with a range of organizations help keep family planning issues in the forefront. They also build the stature and reputation of the organization and help establish for it a secure and important role. In addition, you can use these relationships to keep informed about new developments -- political, social, and technological -- that may affect you.
- Strong relationships with commercial sector groups involved in family planning are relatively new for family planning PVOs. They expose the organization to new approaches for promoting and delivering family planning services. They also make available additional expertise that can benefit your own operations. Most important, relationships with commercial suppliers affect the organization's ability to provide uninterrupted service.
- Strong relationships with education and training institutions help you attract their graduates. You can also use the resources of those organizations to help develop your workers.

Strong relationships with donors and other contributors provide steady sources of funding.

As you think about your organization and how it operates, you can easily identify other benefits your relationships bring. Since relationships always involve "give" as well as "take", you also know how much the organization has to put into the development and maintenance of the network. What you want out of it depends on the role of your organization, the climate in which it operates, and the effort you choose to devote to it.

Sources of relationships

PVOs are fortunate because they have many avenues to develop and maintain relationships. Boards, for example, often consist of influential individuals from government and the private sector. These individuals afford immediate status to the organization. Very often, they represent other important organizations involved in some way in family planning. In any event, they can usually provide access to various sources of power and influence and help the organization participate actively with others in the family planning field. Other sources of relationships include staff and volunteer workers, colleagues in organizations that are part of the network, and clients. These sources can be used naturally, in the course of other activities, to develop and maintain important organizational linkages.

It is up to the organization to use these sources well. This means making sure people understand the value of institutional relationships, encouraging them to reach out, helping them strengthen relationships they already have, and rewarding them for their efforts. It also means using the relationships well so that everyone can see the benefits they bring to the organization.

Preparing for the Assessment

If you elect to use the team approach, it will be helpful to discuss with team members the concept of institutional relationships and the many ways they can work for the organization. Team members might include a selection of service providers and administrators. You might also choose to include a Board member who is aware of the potential for relationships and is familiar with the organization's role and linkages within the local family planning service community.

Assessing the Organization's Network of Relationships

This series of exercises helps you identify (1) the organizations that are now part of your institutional network, (2) the ways those relationships were developed, how they are used, and how strong they are, and (3) additional organizations with which relationships should be developed. These exercises are designed for use by a team. However, they can be carried out by an individual, using the same thought process.

EXERCISE 1: ASSESSING THE CURRENT NETWORK

The purpose of this exercise is to define your organizational network and see how well it serves the organization.

Step 1. Defining the current network

Using the "Network Assessment Worksheet" format that follows, develop a list of organizations with which you have relationships. Be sure to go beyond strictly "family planning" organizations if your organization has these kinds of linkages. Enter each organization in the left-hand column.

NETWORK ASSESSMENT WORKSHEET		
		5 = very strong 4 = strong 3 = moderate 2 = weak 1 = very weak
Organization	Purpose of Relationship (A)	Strength of Relationship (B)

Step 2. Describing how relationships are used

Discuss the kinds of relationships your organization has with each organization listed, focusing on what the relationship is for, or what it does for you. Some of the relationships will probably have more than one purpose, so be sure to list all of them. Enter brief phrases describing the purposes in column A.

Step 3. Assessing the strength of the relationships

In this step, you estimate how strong each relationship is on the scale of 1 to 5 shown on the worksheet. Enter ratings in column B. In assessing strength, there are a number of things to consider -- how firmly you can "count on" the organization, its past record in supporting or collaborating with your organization, how long the relationship has existed, how often your organization actually communicates or interacts with the other organization, your record in supporting others, the extent to which you share common interests, the potential for competition for clients, funds, or influence, and whether the linkage depends on a narrow relationship between individuals or on a solid institutional relationship. Before you assign ratings, discuss the factors that determine relationship strength in your environment.

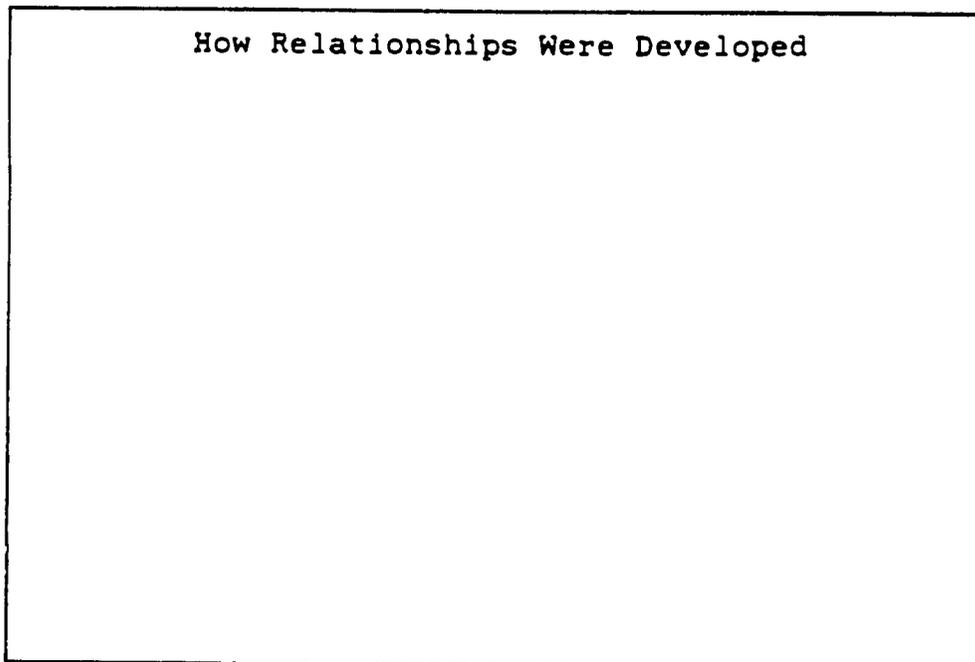
Step 4. Seeing what it takes to develop and maintain relationships

The completed worksheet shows the results of your efforts up to now. Knowing how the organization got to this point is

important in deciding whether it is using its other assets well in developing relationships. This knowledge will also help you decide later on strategies to strengthen these relationships and initiate new ones.

First, post a blank sheet of paper and write "How Relationships Were Developed" at the top.

How Relationships Were Developed

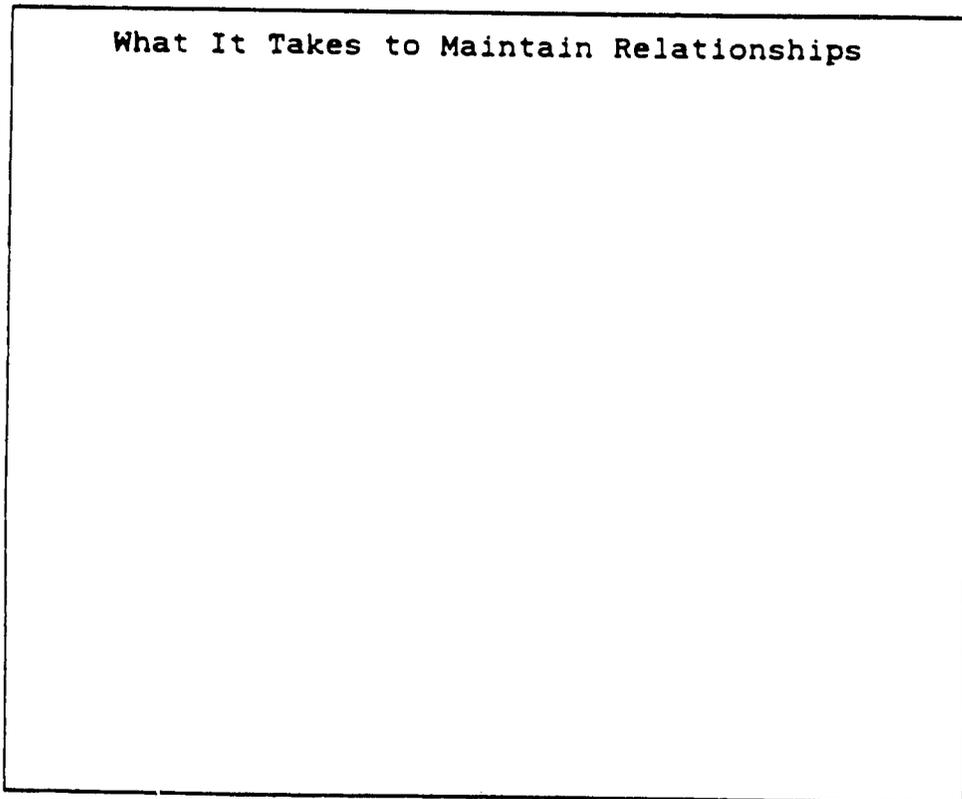


Write on it a list of strategies the organization has used up to now in establishing the network. These might include talking regularly with key members of the community, asking Board members to introduce you to other organizations, attending professional meetings, developing joint programs or collaborating in some other way with other organizations, or serving on a multi-organizational council. In developing this list, consider

what all of your workers do. You may discover that both staff and volunteers are assisting the organization in ways you were not aware of before.

Second, post another blank sheet of paper entitled "What It Takes to Maintain Relationships." What you want to do now is determine what kind of effort, and how much of it, you devote to keeping your network strong and useful. Think about all of the activities associated with networking, and list them on the sheet.

What It Takes to Maintain Relationships



EXERCISE 2: IDENTIFYING OTHER RELATIONSHIPS NEEDED

The purpose of this exercise is to determine whether or not there are additional organizations in the community with which linkages should be developed. A sample chart follows. First develop a list of the organizations that did not appear on the worksheet you used in Exercise 1, but that you believe should be part of the network. Discuss (1) reasons that these relationships have not yet been developed, (2) what the potential benefits would be, and (3) how important you think it is to pursue additional relationships. Summarize these findings under "Comments" on the chart.

Organizations	Comments

Identifying Opportunities for Improvement

You now have a clear picture of your current network and the strengths of the relationships that exist. You also know what it takes to develop and maintain them. In addition, you have identified additional relationships that could benefit your organization. Carefully review what you have now and what you would like to have, and identify priority opportunities for change and the benefits expected. These opportunities may lie in strengthening your existing network and/or extending its scope. You are looking specifically for potential ways to increase the strength of this asset. At this point, do not be constrained by the level of effort you believe it will take. Through other parts of this assessment, you may find that you have more assets than you realized that could be applied to this important area.

Opportunities for change	Benefits

Chapter VIII.

Assessing the Organization's Reputation

About Reputation

An organization's reputation is its image. It is the opinion others have of it -- clients, colleagues, government officials, donors, other professionals, competitors, community leaders, and other members of your organizational network. These opinions develop in very complex ways. In large part, they result from what people know about the organization -- its goals, its programs, its record of achievement, its staff, the extent of its community support, and the like. Reputation is also affected by what people think they know, or what they assume about the organization. Thus, no organization can have complete control over its image. However, paying careful attention to the process of image development and to all of the factors that affect it increases your potential for control. Striving for excellence, building on successes, and "marketing" the organization in whatever ways the environment permits are key to developing this capacity.

Every organization wants a good reputation, to be well thought of. Organizations that develop, maintain, and use this asset well have a strong competitive position and face fewer

unnecessary obstacles than others in working towards achievement of goals. For example, an organization known for excellent programs is more likely to receive funding than one with only marginal success. In addition, both workers and clients are attracted by a well known and respected organization. Further, an organization that is viewed as highly competent and professional can often take stands on important issues and persuade others to adopt the organization's position. As you think about your environment, you can surely see other ways also that reputation can serve the organization.

Choosing and using your image

Each organization must decide what image it wants, or what it wants to be known for. First and foremost is usually the quality of its programs. If you completed Chapter VI, you saw that there are things you can do to build your program assets and use them to benefit the organization. One of the important benefits is a good organizational image.

There are many other things that contribute to the organization's reputation as well. For example, the extent to which you are seen to collaborate and cooperate with related organizations will influence their opinion of you and your stature in the community. How frequently and how loudly the organization speaks out is another factor. All family planning PVOs run the risk of alienating government, religious, and other institutions if they advocate for things that are inconsistent

with prevailing policies or cultural norms. On the other hand, there are many situations where the organization wants to establish a leadership position, and leadership may depend on how outspoken the organization is, even on controversial issues. The attitude of workers toward the organization also contributes to reputation. Worker enthusiasm shows clients and others that the organization cares about its programs and is an exciting place to work. Further, the degree of professionalism shown by the organization affects the respect other professionals have toward it. The balance between flexibility and consistency is another potential component of reputation. An organization that seems to switch its priorities and interests frequently may be viewed as unstable and not taken seriously; on the other hand, if it is perceived as refusing to change when change is warranted, it is viewed as insensitive to the community it serves.

Thinking about the image of your own organization and others that you know, you can add other examples of things on which your reputation depends. The first challenge is to choose what you want your image to be and then make sure everything about your organization contributes to developing that image. The second is to use your reputation in whatever ways you can to strengthen the organization.

Preparing for the Assessment

This assessment can take excellent advantage of a wide range of sources. The exercises are difficult for one person

alone to work through, so the team approach is recommended. You may want to select individuals from all parts of your organization and also include one or two representatives from the network you described if you completed Chapter VII. It is true that you want to be careful about outsiders participating in an analysis that may show some weaknesses in the organization. On the other hand, since the image is something that outsiders have, it is important to identify and understand their views. Depending on your organization's relationships with others, you may be able to find qualified individuals whose participation will represent little or no risk to the organization.

The reports and other documents recommended for consideration in Chapter VII may also be useful here. Therefore, if they are available, they should be given to team members for review.

Assessing Your Organization's Reputation

This series of exercises helps you (1) define what you want the organization's image to be, (2) examine what your reputation is and why, and (3) see what the organization currently does to develop and maintain its image.

EXERCISE 1: DEFINING A DESIRABLE ORGANIZATIONAL IMAGE

The purpose of this exercise is to determine exactly what image the organization wants to project, or how it wants to be

viewed by outsiders. Review the factors described earlier in this chapter. See how many of them apply to your organization. For those that do, decide what they should specifically say. For example, in the area of speaking out, decide to what degree you want your organization to be viewed as outspoken, considering the potential benefits and consequences of this aspect in your own environment. Then consider whether there are additional factors that you believe are important to your organization's reputation. Post a list of all the factors you have selected. You will refer to this list in Exercise 2.

<p>Factors important to reputation</p>
--

EXERCISE 2: DESCRIBING THE ORGANIZATION'S REPUTATION

The purpose of this exercise is to develop an estimate of how your organization is viewed by groups whose opinions are important. The first step is to identify these groups. Think

Now look carefully at the completed worksheet and consider it in terms of the table that follows:

IMPORTANCE

low → high

high ↑ RATING ↓ low	3. Resources that might used elsewhere	1. Strengths that need to be maintained
	4. Weaknesses that are not particularly damaging	2. Priorities that need improvement

Your strengths are where both rating and importance are high (Box 1), and the organization needs to maintain its image with these groups. Box 2 indicates where efforts probably should be focused; it may be possible to put less emphasis on Box 3 groups and reallocate resources to improving your image with higher priority organizations. Where your image is high among groups that are relatively unimportant -- those that are near the bottom of the worksheet -- you may decide to limit your promotional activities.

EXERCISE 3: DESCRIBING HOW THE ORGANIZATION DEVELOPS AND MAINTAINS ITS REPUTATION

The purpose of this exercise is to analyze what you currently do to establish the image you want. Documenting these efforts will help explain why your reputation is what it is and estimate how hard the organization is working to develop and use this important asset.

Review the results of Exercise 1 so that you have a clear picture of the image you want to project. Then think carefully about the strategies the organization uses to project this image. For example, do you "advertise" your successes to the extent you can? Remind your workers that they represent the organization to clients and others and therefore help shape its reputation? Show your respect for community leaders? Keep interested groups informed about what your organization is doing? Actively cooperate with and support other organizations? Work with groups that might oppose you to explain your position and persuade them to work with you? Encourage allied groups to tell others about your organization? Try to find out how the organization is viewed by others and develop ways to strengthen positive opinions? List all of the strategies the organization now uses to develop and maintain this important asset.

Strategies

Identifying Opportunities for Improvement

You now know what kind of reputation you want and the factors on which it depends. You also know what the organization is doing to promote its image and have estimated how successful these efforts have been. You can see what has worked well, and where additional attention could help. Now is the time to identify opportunities for change. Review your findings and conclusions from all three exercises and develop a list, in priority order, of areas in which the organization's reputation could be improved. Also indicate how the organization could make better use of its reputation and what benefits you would expect from the changes. In making these decisions, think about the relative importance of the groups you are dealing with and

how much control you can really have over the elements that make up your reputation. This will help you later on when you decide what you will do to improve the strength of this asset.

Opportunities for change	Benefits

Chapter IX.

Assessing the Organization's Financial Assets

About Financial Assets

An organization's financial assets include its cash funds and its equity, or the value of major items it may own, such as land, buildings and vehicles. In-kind or donated labor and materials are also often considered financial assets, as are stocks of contraceptives and other supplies. No organization will dispute the value or importance of these assets. You probably study them frequently, always looking for ways to extend services and cope with rising costs.

This assessment is not an examination of your accounting or financial management procedures. The Appendix contains references to other manuals that can help you in that way. The focus here is on looking at how these assets are used in terms of what the organization is trying to achieve. As every PVO manager knows, there are always painful choices to make about how funds should be allocated, and competing priorities are an organizational way of life. This assessment helps you identify options, review choices already made, and determine how much flexibility you have in improving the use of these assets.

While the assessment does not focus directly on the details of your accounting and financial management systems, it is

important to remember two things. First, these systems -- what they look like and how they work -- can influence the confidence and flexibility you have in making financial decisions. Second, the accounting and financial reporting requirements of donors in many cases dictate what these systems must be. Often these requirements conflict with each other. If you are receiving support from more than one international donor, you may well find that you are running more than one system, and that they are inconsistent. Compliance is critical to continuation of support, so it is important that you find out what is expected of you.

Preparing for the Assessment

You will need at least some summary budget information to conduct this assessment. Ideally, records showing how your financial assets have been allocated for the past two or three years should be available for review. The form this information takes will depend on your own internal accounting procedures and how you keep your records. What you should have here is a description of how, or for what purposes, your funds have been spent. For example, you want to know how much went toward salaries of service providers, managers and supervisors, worker training, family planning supplies, rent for facilities, and other activities. You also want to know how much equity you had in land, buildings, or major equipment and whether or not this was used in securing loans to support other aspects of your

operations. In addition, you will need whatever future budget summary information is available, indicating what income you expect and how you plan to use it.

Because of the nature of the questions you will be looking at, it will help to have individuals familiar with your organization's finances participate in this process. It is also useful to involve others who can benefit from knowing about the financial choices the organization has to make and on what basis they are made. Therefore, if you choose to assign a team to this part of the assessment, you may want to include a cross-section of workers to explore these important questions.

Assessing Your Financial Assets

This series of exercises is a straightforward approach to defining what your financial assets are, how they are currently used, and how close the fit is between the use of these assets and what the organization wants to achieve. The objective is to discover areas where you have some flexibility and could make changes that would benefit the organization.

You can decide how detailed you want your study to be. This depends in part, of course, on the records available to you. Even if your records permit a very detailed analysis, you may choose to make informed estimates rather than to spend a great deal of time developing absolutely accurate figures for every item you will review. That approach is perfectly workable here. You are looking for general patterns and for obvious

differences between priorities and expenditures. Informed estimates are accurate enough for these purposes.

EXERCISE 1: DEFINING SOURCES OF INCOME AND OTHER ASSETS

Using the "Financial Asset Summary Worksheet" format that follows, first review your budget documents to see where your funds come from, what the financial value is of major items you currently own, and what your in-kind contributions amount to.

FINANCIAL ASSET SUMMARY WORKSHEET		
Funding Source (A)	Amount (B)	Restricted (C)
Other Financial Assets		
In-kind Contributions		

Enter the source of funds in column A and the cash value in column B on the upper half of the worksheet. Some of your funds

may be "restricted." That is, they must be used for only one purpose or devoted to only one area, such as supplies, salaries, a particular location, or one kind of service. This is frequently the case with certain types of grants, where the donor and the organization agree to limit the use of the funds for specified purposes. If any of your income falls in this category, enter a checkmark in column C.

On the lower half of the worksheet, enter the asset values of items you own, such as land, buildings, and vehicles. Your ability to borrow funds against these assets depends on local banking laws and practices. Even where it is feasible, your organization may not make active use of these assets in this way. However, they should be listed so that you are aware of their potential, as you may be able to use them in the future to increase your flexibility. Also include your supply stocks in this section.

At the bottom of the worksheet, estimate the value of your in-kind labor and materials.

EXERCISE 2: DESCRIBING HOW YOU USE YOUR ASSETS

The purpose of this exercise is to look at how your financial assets are spent, and to see whether or not the organization's spending patterns reflect what it says its priorities are.

The first step is to develop the broad categories of expenditures you want to work with. Your budget records probably already have some categories, such as salaries, rent, supplies, equipment maintenance, and transportation. You may want to change or expand these categories. For example, you may feel that recruitment and management of volunteers, worker training, or client follow-up should be reviewed individually. Think carefully about what the organization wants to do, and then list the categories you have chosen in column A of the "Expenditure Category Worksheet" format that follows.

EXPENDITURE CATEGORY WORKSHEET	
Categories (A)	Amount Spent (B)

The next step is to estimate in column B how much money is being spent on each category. This may take a good deal of thought and discussion. For example, if you choose to focus on

recruiting and managing volunteers, you will probably find that your budget records do not account for this activity. Instead, you can estimate how much time selected staff spend doing this, and then compute the cash value of that time.

After you have developed your estimates, study the completed worksheet carefully and consider the following kinds of questions:

1. Does the amount spent on each category match its priority? List areas where the match appears poor, and discuss possible reasons for the imbalances.
2. Could money now spent in one area be transferred to another with higher priority? What would the consequences be?
3. Is anything "not covered?" Does this mean it is not being done?
4. If you have restricted funds marked in column C, what is the effect of the restrictions on the organization as a whole?
5. Have there been any major changes recently? If so, why, and what are the effects?
6. Was there anything unusual about the year you are looking at?
7. How well does the expenditure pattern match the organization's goals?

Summarize your thoughts on a separate sheet for review at the end of this chapter.

Ideas about expenditures

EXERCISE 3: PREDICTING FUTURE FUNDS AND EXPENDITURES

The purpose of this exercise is to compare your future financial needs with your anticipated income. Assume the future is two years from now. There are certainly many unknowns -- the extent of continued support from donors and other contributors, the future rate of inflation, the level of demand for services, and others. However, looking to the future will help you plan for the things that you can control.

The first step is to estimate your future income. Refer to the worksheet you developed in Exercise 1. If you anticipate the same sources in the future, enter them in column A of the "Future Projections Worksheet" format that follows, together with the amount. Add any additional sources you believe you

FUTURE PROJECTIONS WORKSHEET				
FUTURE ESTIMATED INCOME (A)			FUTURE ESTIMATED COSTS (B)	
Source	Amount		Category	Amount
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
		██████████		
Total _____			Total _____	

will have, and the amount of money they will provide. If you are not certain about future income, make an educated guess based on past experience.

The second step is to estimate your future expenditures. Refer to the worksheet you developed in Exercise 2. Look at the categories, and decide whether you expect them to continue. Make whatever changes you think are necessary, and enter them in column B, together with what you think they will cost. Add up totals at the bottom of each column, and see how well they match.

Identifying Opportunities for Improvement

You now have an overview of what the organization's financial assets are and how they are used. You also have a sense of what the future holds, and what your future needs and resources will be. Review carefully all of your findings and conclusions to identify areas where the organization can make better use of its financial assets. Develop a list of these areas in priority order, indicating what you expect the benefits will be.

Opportunities for change

Benefits

Chapter X.

Assessing the Organization's Facilities and Equipment

About Facilities and Equipment

Facilities and equipment are essential to support your programs. Vehicles for transport, contraceptive supplies for distribution, storage for supplies, and places to provide services to your clients are examples of the kinds of support programs can require. You also need an organizational home -- space, office equipment, desks and chairs, and office supplies. No matter how modest an organization is, some of these "basics" are always needed.

Your facilities and equipment are assets in one sense because they are worth money. They are assets in many other ways as well. For example, they affect the morale of workers. Having adequate supplies on hand, being able to get to clients, or having a serviceable place to meet with clients increases workers' confidence in themselves, the program, and the organization. Facilities and equipment also contribute to your image in the community and thus to your reputation for being able to do well what you say you do. In addition, depending on the kinds of programs you have, these assets can be a major factor in determining whether or not you can deliver services.

Vehicles that break down or do not run on schedule interrupt your supplies; poor warehousing causes waste; inadequate inventories disrupt services; and medical equipment that does not work well prevents good treatment. Finally, the facilities and equipment at your organizational home make a difference to everyone because they affect your ability to oversee and control everything the organization does.

These kinds of assets, and the way they are used, therefore make a critical difference to many aspects of your organization. This chapter focuses on assessing how well they serve you. It helps you consider the many tasks associated with making sure these assets are used well -- knowing what you have, planning for maintenance, and seeing that these assets are allocated fairly and sensibly. It also helps you identify opportunities for change that will benefit both your programs and your organization in general.

Preparing for the Assessment

Virtually everyone in your organization uses some of these assets. Therefore, if you choose the team approach, you might include representatives from various parts of the organization to make sure that the assessment covers all of the assets in this category and all of the uses to which they are put. Service providers are especially important here, since they are the people who depend on equipment and supplies to bring services to clients. Since the assessment will involve esti-

mating maintenance costs, you might also include an individual who knows what your costs are or has special skill in this area.

In terms of documents, a list of the organization's equipment and facilities would be helpful if it is available.

Records of maintenance costs would also be useful.

Assessing the Organization's Facilities and Equipment

These exercises help you define what your organization's assets are in this category, examine their use, and assess the fit between the way they are used and what the organization wants to accomplish. They may be conducted by an individual or by a team.

EXERCISE 1: DEFINING YOUR ASSETS

The purpose of this exercise is to develop a list of all the equipment and supply assets the organization has so that you can assess how well they are used in working towards achieving your goals. If you have a list available to you, review it for accuracy and see if there are any items that should be added or removed. If not, think about what the organization has and develop a list yourselves.

The next step is to decide on categories of items. For example, you may want to combine all of your desks, chairs, lamps, file cabinets, and bookcases into one category called "Office Furniture." A similar category might be "Examining Room

Equipment." It is not necessary to list every item separately. This assessment is not a detailed inventory. It is a broad look at what kinds of facilities and equipment you have and how you use them. Enter categories you choose in column A of the "Equipment and Supplies Assessment Worksheet" format that follows.

FACILITIES AND EQUIPMENT ASSESSMENT WORKSHEET		
Category	User-Uses	Estimated Maintenance Costs
(A)	(B)	(C)

EXERCISE 2: DEFINING THE USE OF YOUR EQUIPMENT AND SUPPLIES

The purpose of this exercise is to see how your equipment and supplies are used to support your programs and your organi-

zational home. It is important to keep two separate functions in mind -- (1) delivery of program services and (2) overall management of the organization. Both of these functions need and use various combinations of these assets.

Taking each category developed in Exercise 1, enter the ways the items are used -- both by programs and by management -- in column B of the worksheet. Some items will have multiple uses, so be sure to list all of them. Also indicate who uses the item for each purpose. For example, you might show "travel to clinic - nurses" as one entry for vehicles. You will use this information later in deciding whether the use of these assets makes sense in terms of what the organization is trying to do and is fair to your workers.

EXERCISE 3: ESTIMATING MAINTENANCE COSTS

It costs money to buy equipment and facilities. It also costs money to maintain them. Maintenance costs also apply to equipment donated to you. They are therefore an important factor in analyzing how well items are used. For example, if you have something that is very expensive to maintain but is of limited or marginal use to the organization, you may consider not using that item in favor of other things that are more essential.

Develop maintenance estimate costs for each category and

enter them in column C of the worksheet. Use records to support these estimates if you have them. If not, then just make a best guess as to the annual expenditures involved. It is not necessary that your figures be highly accurate. You want to develop a picture of about what things cost, and how costs for one category compare with those of others.

EXERCISE 4: ASSESSING HOW WELL THESE ASSETS ARE USED

Review the completed worksheet carefully to see if the organization is taking maximum advantage of what it has. Consider the following kinds of questions:

1. Does it make sense to use things the way they are used now?
2. Are use patterns fair to everyone, or are some people better supported than others?
3. Is anything being wasted? Is there any loss due to theft?
4. Are there any gaps, where an item should be used for some purpose but is not being used for that purpose now?
5. Are any of the costs too high for what these assets bring to the organization in return?
6. Are programs better supported than management, or vice versa? Should the balance change? If so, in what way?
7. Do the uses of these assets and the money spent to maintain them reflect accurately what the organization is trying to achieve?

Record your conclusions on a separate sheet of paper for review later in identifying opportunities for improvement.

<p>Conclusions about uses</p>

EXERCISE 5: PROJECTING FUTURE REQUIREMENTS

On the basis of what you have done up to this point, consider the future -- two years from now -- and estimate what equipment and facilities you think the organization should have at that time and how it should use them. Using the "Future Facilities and Equipment Projection Worksheet" format that follows, use the same procedures you used in Exercise 1 through 3 -- defining categories, defining users and uses, and estimating maintenance costs. If the organization is planning

to expand its programs to new locations or develop new kinds of programs, be sure to consider these additional requirements in developing your projections.

FUTURE FACILITIES AND EQUIPMENT PROJECTION WORKSHEET		
Category	User-Uses	Estimated Maintenance Costs
(A)	(B)	(C)

Identifying Opportunities for Improvement

You now know what kinds of facilities and equipment you have, how you use them, and what it costs to keep them up. You also have an idea of what your future needs will be. Using all of this information, identify opportunities for improvement that

you think would have major effects on the organization's ability to achieve its goals. List these areas in priority order and indicate what the expected benefits would be.

Opportunities for change	Benefits

Chapter XI.

Assessing the Organization's Information Assets

About Information

Accurate, current information is an important organizational asset. The assessment activities you have conducted so far show how useful it can be. It helps you analyze what you have and what you do. It also helps you make choices about how to use your other assets and about how to achieve organizational goals. It increases the scope of your control over the organization and over many of the things that affect it.

To keep the organization strong, you need information both about the outside world and about your own organization. With regard to the outside world, for example, knowing about your area's demographics helps you estimate how much demand there is for your services and design your programs to appeal to your particular clients. Knowing what related organizations are doing helps you collaborate, cooperate, and compete with them. Knowing about international family planning norms and policies and about the requirements and regulations of donors helps you gain and maintain support. Knowing about new techniques or approaches in family planning helps you constantly upgrade your services. Knowing what the political climate is helps you

decide how high a profile you want and how to promote your organization in a positive way. In general, the more you know about your own environment and beyond, the better able you are to decide what your contribution is and how to make it.

In terms of your own organization, you need to know what all of your other assets are, and how they are used. You need to know how much money you have and how it is being spent, who your workers are and what they are doing, what your implementation problems are and what feasible options you have to solve them, what your programs are achieving, what you can expect in the future, and what the organization needs to do to maintain and improve its overall performance. This knowledge helps you make the most of what you have.

Choosing and using information

The value of your information assets depends on what information you have and how you use it. Deciding what you need to know, and what information you can really use, is the first step. These decisions need to be reasonable. You will probably never have all the information you need. Some of it may not even exist. Even if it does, it may cost so much and take so long to get it that it will not serve you well. Many organizations of all kinds collect massive amounts of information and are then unable to take advantage of it. Either there is so much information that it overwhelms people who try to use it, it isn't organized in the right way, it is too late, or it is not

relevant to the organization's real information needs. Valuable time and money are spent on collecting information, but there is no payoff for the organization. The information assets are plentiful, but they are not valuable.

Choosing what you want and need to know takes a lot of thought. While some information needs are shared by most family planning PVOs, others are specific to each organization. It is up to you to decide what your needs are. This decision rests on what you will do with the information when you have it. For example, there is no sense in collecting focus group information unless you are going to use it in structuring your programs and services. Once you know how you will use the information, then you can decide when it should be available, and to whom. Strong information assets are chosen carefully and used well. An organization with these kinds of assets has better control over its present and future and can make informed decisions. That is the main purpose of information.

Preparing for the Assessment

Information needs affect the entire organization. Different people need and use different information, but everyone has a stake and an interest in this asset. Therefore, if you choose to use the team approach, you might include a cross-section of workers from different parts of the organization with different views of what information the organization should collect and distribute. It is important to note that the

assessment does not focus on "information systems," but more broadly on information in general. Thus, knowledge about the mechanics of information systems is not necessary.

Assessing Your Information Assets

This exercise guides you through identifying information needed for managing the organization and its programs or activities, seeing whether or not it is now collected, analyzing where it comes from and how it is used, and deciding what additional information the organization needs.

EXERCISE: ASSESSING INFORMATION ASSETS

The purpose of this exercise is to determine (1) what information you need (2) how you use program it. You will be thinking about what you have now as well as what you would like to have.

Step 1. Defining information needs

The first step is determining all of the information you think you need. Carefully consider all aspects of your organization and develop a list of important information items. For example, the list might include demographics of your service community, budget data, use patterns and service figures, market

demand statistics, the current and planned activities of other organizations, status of facilities and equipment, the way tasks are assigned and carried out by your workers, donor funding policies and accounting requirements, and current family planning research findings. Remember that this list is what you need, not just what you have now. Enter categories of information you select in the top half of column A of the "Information Assessment Worksheet" that follows.

INFORMATION ASSESSMENT WORKSHEET				
Information (A)	Have? M/P		Source(s) (D)	For whom?/Why? (E)
	(B)	(C)		
Information needed:				
Information collected but not needed:				

Step 2. Defining what you have

The second step is analyzing the list to see what information is now regularly available to the organization. Look in turn at each item you have entered in column A. If it is now routinely collected by the organization, enter a checkmark in column B. If not, leave column B blank.

Also, review the list to see whether or not there is any information the organization now collects that you did not include. This would be information you do not need. Enter these items in the bottom half of column A. Put a checkmark for each one in column B, since this information is available to the organization. It is important to note these items now, because you may later decide that the effort put into collecting them can be directed toward gathering other information that is more important.

Step 3. Deciding what kind of information you need

Information can meet "management" needs, "program" needs, or both. For example, information about worker performance -- attendance, relationships with clients, productivity -- is relevant in both areas. It affects the quality of services as well as the organization's ability to manage its assets. This step involves determining the primary uses of the information you have entered in column A. Taking each item in turn, enter "M" in column C if it is primarily for management purposes, "P" if it is primarily for program purposes, and "M/P" if it meets both kinds of needs. At the end of the exercise, you

will be taking an overall look at the organization's information assets to identify opportunities for change, and knowing how broadly certain kinds of information assets serve the organization can help you assess priorities.

Step 4. Identifying where you get your information

Look at all the items you checked in column B. Decide where the information comes from and who collects it, and enter your findings in column D. For example, column D for distribution information might read "outlets - clerks." For client attitudes, it might read "focus groups - interviewers."

Step 5. Assessing how much information you use

Review carefully every item you checked off in column B and see whether or not that information is actually used by anyone in the organization. Pay particular attention to the items you added in Step 2 that you thought the organization did not really need. Sometimes old procedures to generate information stay in place longer than they are needed, and organizations continue to collect information that they no longer use. For every item in column B that you believe is used, determine who uses it and enter the title(s) of the user(s) in column E. Some information will have multiple users, so be sure to enter all of them. Also, make a brief note after each user about why he or she needs the information and how it is used.

Identifying Opportunities for Improvement

Review the completed worksheet carefully. It will show you how well developed the organization's information assets are, and how well the organization uses them. Identifying opportunities for change, consider how well the organization's information needs have been defined up to now and whether the way information is used makes sense. List your conclusions in priority order, and indicate what the expected benefits would be.

Opportunities for change	Benefits

Chapter XII.

Assessing the Organization's Systems

About Systems

Systems are the ways that things get done in the organization. An organization may have systems to organize and produce information or to manage money, inventories, workers, distribution, services, client follow-up, equipment maintenance, program monitoring and evaluation, reporting, or other functions. There are more generalized systems as well -- for making decisions, planning, sharing information, and communicating with others. All of these systems affect how the organization operates and how it gets things done. Thus, they affect the organization's ability to achieve its goals.

Formal and informal systems

Some organizational systems are "formal." These systems are usually written down in the form of regulations or procedures. Sometimes the systems are computerized. Even if they are not documented, they are the organization's "official" statement on how things are supposed to be done, and people know what they are. Organizations also have "informal" systems; these represent the way things actually get done. Sometimes

they match or support the formal systems. In other cases, they may conflict with them. Communications are a good example of an informal system. News travels through the organization in many ways, not all of which are consistent with official communications channels. Decision-making is another kind of system that may have both formal and informal components. There may be formal requirements regarding who makes a decision, and on what information and criteria it should be based. In reality, some decisions may be made at different points, and they may be based on other factors.

Systems as assets

Systems can be either an asset or a burden to the organization. Systems developed for their own sake, or according to inapplicable standards established elsewhere, usually fall in the latter category. Systems that are tailored to the organization's specific needs, that are usable by its workers, and that help get work done are assets. The general characteristics of these kinds of systems are described below. As you review your own systems, you may discover additional ways they serve your organization.

Helpful systems organize and simplify a process. They make complex tasks easier to carry out and manage. While they may not reduce the amount of work required, they make it more meaningful and productive. Inventory management is a good example. A helpful system tells you what you have, where it is,

when it should be moved, and when you should reorder.

Helpful systems also set relevant standards. Routine tasks, such as equipment maintenance, are standardized to make sure that the equipment adequately supports your activities. A treatment protocol is another form of standardization. Its purpose is to ensure quality treatment for each client. Standards tell workers what is expected of them, and they are a reference point when people have a question about what they should do. Standards also promote fairness to both clients and workers. In addition, standards limit flexibility to some extent. Therefore, each organization needs to decide how much of a "system" is desirable in each area of its operations.

In addition, helpful systems aid in making decisions. They tell you what you need to know when you need to know it. For example, your financial system tracks your budget and expenditures and warns you when you are running short of funds. Your personnel system tells you who your workers are, what talents they have, what they are doing, and how well they are doing it so that you can decide whether or not the organization is making the most of them.

Finally, helpful systems are worth the effort it takes to run them. Unused systems, like unused facilities, workers, or relationships, are of no value to the organization. All systems require work and money, regardless of how simple they are. What the organization gets out of them should justify what it puts into them. Very often, an informal system develops because a

formal system doesn't seem to work. In these cases, the formal system does not appear to be worth the effort to the people who are supposed to use it.

Every organization has different system needs. The numbers and kinds of systems you have depend on what your organization does, the number and level of workers you have, and reporting requirements that may be imposed on you by local government, donors, or other institutions. All of these considerations are important in determining what you need to systematize, how extensive your formal systems should be, the kinds of informal systems you want to encourage, what you want to standardize, how much the organization can put into its systems, and what it expects to get out of them. This manual helps you look at these kinds of questions. It does not attempt to guide you through a detailed analysis of each system. There are a number of books listed in the Appendix that can help you in that way. The focus here is on gaining a broad understanding of how well your systems work for you.

Preparing for the Assessment

Systems, formal and informal, affect everyone in the organization and every aspect of its operations. People in higher positions tend to use some systems, such as personnel management, financial management, and monitoring and evaluation, but these systems affect workers at lower levels. Other systems

may actually be implemented by lower level workers, such as inventory management and distribution. Therefore, if you choose the team approach, you may want to select representatives from various parts of the organization and from various levels.

Assessing the Organization's Systems

This exercise assumes the participation of a team. If you are conducting the assessment by yourself, then use the exercise to guide your own analysis.

EXERCISE: ASSESSING THE ORGANIZATION'S SYSTEMS

The purposes of this exercise are to define the organization's current systems and analyze how useful they are -- whether they seem to help the organization and are worth what it takes to maintain them. You will also consider whether the organization could benefit from additional systems covering other aspects of operations.

Step 1. Defining the organization's current systems

The first step is to develop a list of all systems the organization now has -- financial management, personnel management, information management, communications, inventory management, equipment maintenance, and the like. It is important that you consider all of the organization's systems, both formal and

Step 2. Assessing the strength of the systems

Taking each system individually, rate its strength on the scale of 1 to 5 shown at the top of column B. Strength is a measure of how valuable and useful the system is to the organization. In judging value, consider the concepts presented in the introduction to this chapter -- how systems can help organize and simplify work, set useful standards, and help you make decisions -- and review the following kinds of questions:

1. Does the system simplify or complicate work?
2. Is it used? If so, by whom, and for what?
3. Is the system itself as simple and streamlined as it can be?
4. Does it organize important information and get it to people when they need it?
5. It is expensive to maintain, in terms of time and money? It is worth it?
6. Does it limit flexibility where flexibility is needed?
7. If the system is informal, should it be formalized?
8. Why do conflicts, if any, exist between formal and informal systems?

Step 3: Identifying areas where additional systems are needed

In reviewing the organization's current systems, you may have discovered a need for systems in areas that are presently uncovered. List these separately, along with the ways you think they would help the organization.

<u>New Systems Needed</u>	<u>How They Would Help</u>

Identifying Opportunities for Improvement

You now know which systems help you, which ones get in the way, and whether the benefits they bring are worth the costs. You also know where new systems would be useful. Review all of your findings carefully to identify ways your systems could be improved. List the opportunities for change in priority order, indicating what the expected benefits would be.

Opportunities for change	Benefits

Chapter XIII.

Assessing the Organization's Plans

About Plans

Plans are the link between what the organization wants to achieve and what it does, between its goals and its activities. Like an accurate map, good plans show you where you are going and how to get there. They also tell you how far along you are and when you have choices about which route to take. All of the assessment activities conducted up to now have suggested opportunities for change. Achieving and maintaining the changes you select depends in part on the organization's ability to develop and use plans.

Like systems, plans help organize things. Also like systems, they can be assets or burdens. They are assets when they help you organize and move ahead. They are burdens when they simply take time to prepare but serve no useful purpose, or when they confuse people about what they are doing and why.

Kinds of plans

Organizations usually have many kinds of plans, either formalized in writing or simply understood by workers. There may be a "grand plan" showing what the organization wants to do

in the next three years and how it will accomplish those things. There may be a plan for opening a new clinic six months from now. There may be a plan for ongoing worker training. There may be a plan for how the organization will participate at a conference next week. Thus, plans vary in scope, complexity, and the numbers and types of people in the organization they are supposed to guide.

Plans as assets

Plans can be used in many ways -- to set targets, to show the relationships between the organization's goals and what it does, to guide workers, to monitor progress, to make sure that other assets are used well, and to help coordinate, integrate, and put into perspective the many activities that go on in the organization all at the same time. There are always things you cannot control, such as outside influences or unpredictable events. Plans can be even useful in that regard. They show clearly how much you can control, help you analyze what effect these other things will have on the plans you have already made, and guide you in developing alternative strategies to achieve your goals.

Characteristics of useful plans

There are many factors that determine how much of an asset the organization's plans are. Common ones shared by PVOs are discussed below. As you review your own plans later in this

chapter, you will discover others that affect the value of plans in your organization. Knowing what these factors are means that you can pay careful attention to how your plans are developed and make them as strong and useful as possible.

Useful plans reflect realistic targets that the organization can meet. A target that is too ambitious is discouraging. On the other hand, one that can be achieved with little effort does not challenge the organization and take advantage of its strengths. Plans with realistic targets can help motivate the organization, and achievement is its own reward.

Useful plans can be implemented, given the organization's other assets. An overly ambitious plan is as discouraging as an overly ambitious target. A plan that is challenging but reasonable in terms of what it takes to carry it out is likely to succeed. Often plans can benefit greatly from the participation of those who will be responsible for implementing them. Those workers understand what the everyday implications of the plan will be. They also have good ideas about how the targets can best be achieved. Finally, when they do participate, they have a stake in the plan's success and are committed to making it work.

Useful plans provide clear direction as to what needs to be done, and why. They also define roles and responsibilities. Some flexibility is always desirable. It encourages workers to use their creativity. A plan with vague targets and directions, however, provides no guidance at all. At best, it is ignored. At worst, it confuses people and interferes with their ability to work.

Useful plans reflect the organization's best judgment about how to use its other assets to achieve its goals. If plans are arbitrary, their weaknesses will rapidly become clear, and they will not be effective tools. When they result from conscious, informed choices, they are likely to work well because their pluses and minuses have been analyzed and weighed in advance.

Useful plans have milestones for monitoring. They define intermediate targets against which you can measure progress and evaluate achievement. They also break down major and complex tasks into more manageable units that are easily understood. The milestones are frequent enough so that obstacles are discovered right away and you have an opportunity to change your strategy before your resources are unnecessarily wasted. Also, as they are achieved, workers are encouraged to continue.

Finally, all of the organization's plans taken together are most useful when they are consistent. Every part of the organization needs a view of the future and guidance as to what its contribution is expected to be. Therefore, the various kinds and levels of plans need to fit well together, and all of them should have a clear relationship to the organization's goals.

How comprehensive your plans are depends on many aspects of your organization -- how large it is, the scope and complexity of your programs, how independent the organization is, the time you have to plan, and the like. The point is that your plans should be useful, whatever form they take, and knowing what makes them work will help you in developing them.

Preparing for the Assessment

Plans affect everyone and can benefit from a wide range of ideas about what they should say and how they should be used. Therefore, the team approach may be very successful here. You might include people who currently make plans as well as those who carry them out. This will give the assessment the broad perspective it needs to determine how well this asset is used.

If you have written plans, they will be a helpful starting point and should be available for review. However, the assessment can be carried out without them. If the organization has a wide variety of plans, it would be advisable to select a sample that represent differences in scope and complexity and apply to different groups of workers within the organization. In addition, if your organization has a goal statement, organization chart, and job descriptions, these can be helpful as reference materials.

Assessing the Organization's Plans

The purpose of the exercise here is to determine how useful the organization's plans are, and why. It is not a detailed analysis of each plan that you have. Rather, it is a broad look at the current value of this asset. It is designed as a structured discussion. If you are conducting the assessment by yourself, then use the exercise to guide your own thinking.

EXERCISE: ASSESSING THE ORGANIZATION'S PLANS

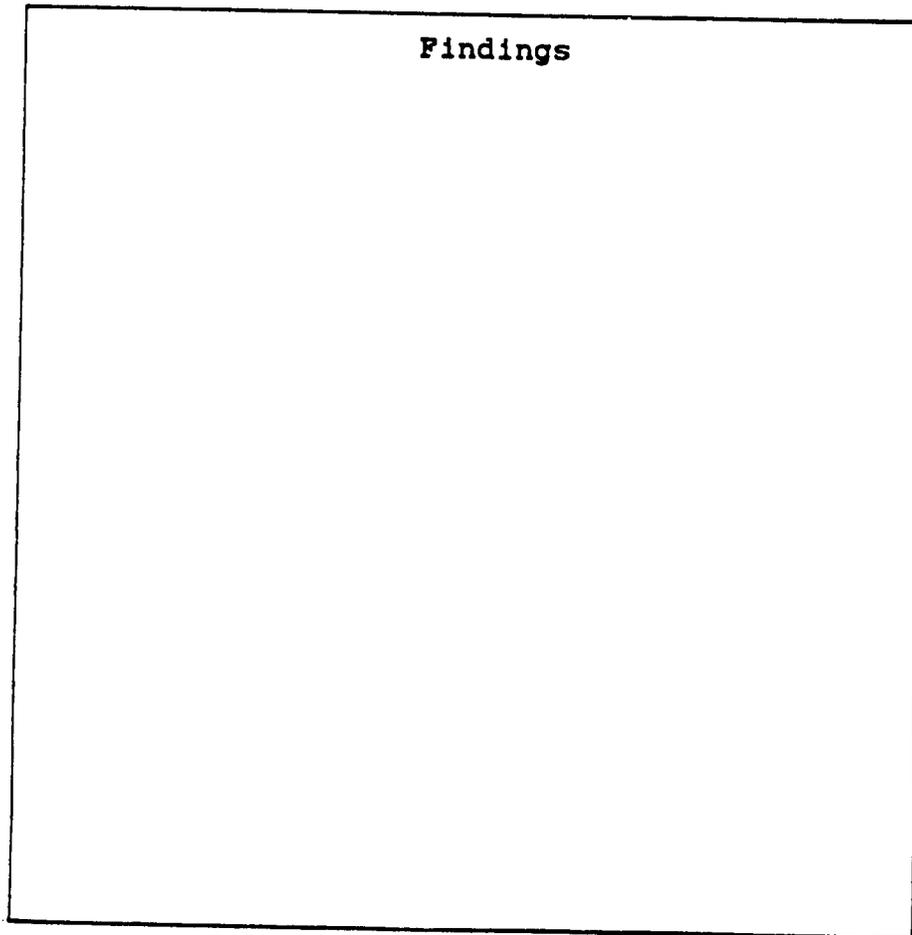
If you have written plans, review their contents so that you are familiar with what they say and how they say it. If no written plans are available, briefly discuss the kinds of plans the organization does have, and how they are expressed. Then look at the factors mentioned earlier in this chapter -- characteristics of good plans -- and think about how well they are incorporated into your plans. Also discuss whether or not there are others that should be added.

The remainder of this exercise is devoted to determining how well the plans serve the organization. With your own plans in mind, discuss the following kinds of questions:

1. Do staff know what the plans say?
2. Are the plans followed?
3. Are they clear?
4. Do they provide enough direction? Too much? Too little?
5. Are they reasonable in terms of targets and strategies?
6. Are they developed by the people who are responsible for implementing them? Or do those people participate in the planning process?
7. Who uses the plans?
8. Are the time frames reasonable? Too long? Too short?
9. Do the plans have milestones that are useful in monitoring?
10. Are the plans consistent with each other and with the organization's goals?

Record the results of your discussion. If there are significant differences among members of the assessment group, make sure that these are clearly stated.

Findings



Identifying Opportunities for Improvement

Plans will be a critical part of following through on the assessment process. Carefully consider both the quality of your plans and the way the organization uses them. Identify opportunities for change that you believe will help the organization take better advantage of these assets. Develop a list in priority order, indicating benefits that can be expected.

Opportunities for change	Benefits

Chapter XIV.

Following Through

The assessment has introduced you to a new way of looking at your organizational assets. This manual was developed for use by a wide range of PVOs. Therefore, you may have found that some parts of it were less applicable than others to your organization, or that not all of the worksheets could be completed. If these things happened, do not be discouraged. The assessment activities you did complete have shown you the organization's many strengths. These strengths can be used to continue the organization's development. The assessment has also suggested many opportunities for change. The question now, of course, is how to take advantage of those opportunities.

Gains You Have Already Achieved

It is important first to look at what you have gained through this process, because the process itself is a kind of change. You have gained information about your assets that you can use in all aspects of your organizational activities. You have opened the organization up to new ways of thinking about itself, and you have gained the interest and commitment of those who worked with you. You have developed a new perspective on

how the organization works, how each part affects the others, and how everything you do is related. You are skilled in identifying both the strengths of your assets and the organization's ability to use them. You have a clear sense of the organization's mission and of the way its assets can help you achieve your goals.

Guidelines for Choosing Additional Opportunities for Change

All of the gains suggested above indicate that your organization has already begun to change. You can keep the process going by responding to what the assessment found. Clearly, no organization is able to take advantage of every single opportunity for change all at once. Resources are far too limited, and choices must be made.

The choices you make will be specific to your organization -- what it has, what it does, what it wants, where it is, and where it aims to be. There are two general principles, however, that can apply universally. First, it is important that the initiatives you select have an impact on the organization. A lot has been invested in the assessment, and the organization needs to get something positive in return. Therefore, in examining all of the opportunities, it is helpful to start out with those that have the greatest impact on the organization. These are sometimes called impact points. As you look at the assessment findings, you will note that some actions will have broader effects than others. For example, a change in

the worker area might affect workers, clients, programs, expenditures, and systems. You will also see that some changes are far more expensive than others. An impact point also represents a cost-effective opportunity for change. What you invest in it will be returned to you in the form of important organizational gains.

The second principle involves building on and repeating successes you have enjoyed in the past. You have identified things that the organization does well. These need to be maintained. Also, by analyzing why those things are successful, you can identify strategies that can be transferred elsewhere to help improve the organization. This approach is relatively inexpensive. It also motivates workers, since they see that their past efforts are valued by the organization.

Choosing Additional Opportunities for Change

Choosing your priorities is the next step. Since you may already have a core of knowledgeable, interested workers in the organization, you may elect to involve some of them with you in reviewing the total picture developed by the assessment and selecting your initial target areas. These individuals may also be able to make valuable contributions to developing specific plans for change. Their creativity may enable you to accomplish even more than you thought you could with the limited resources that you have.

EXERCISE: SELECTING OPPORTUNITIES FOR CHANGE

As stated in Chapter I, this manual stops short of action planning. The purpose of this exercise is to help you analyze what you have found and decide where your change efforts are likely to bring the greatest rewards.

Step 1. Reviewing initial thoughts

Review the worksheet you developed in Chapter II.

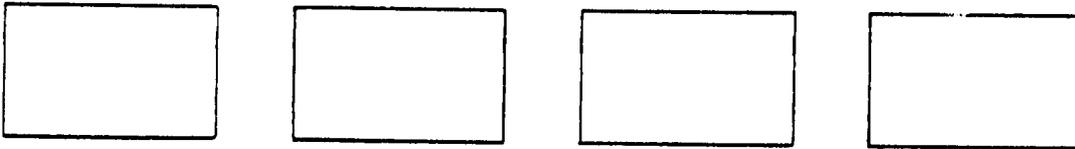
ASSETS	Existence	Importance	Quality
	A	B	C
		5 = most important 4 = pretty important 3 = somewhat important 2 = not very important 1 = unimportant	5 = excellent 4 = good 3 = fair 2 = poor 1 = very poor
Workers			
Goals			
Programs			
Relationships			
Reputation			
Financial assets			
Facilities/equip.			
Information			
Systems			
Plans			

Look at columns B and C to see if the asset "importance" and "quality" ratings still hold. Make whatever changes you feel are warranted based on the assessment activities you have com-

pleted. Then study the relationship between columns B and C to see what your priorities should be.

Step 2. Selecting priority opportunities for change

Look at the "Opportunities for change - Benefits" worksheets you developed for each asset you identified as a priority in Step 1.



Discuss the options they represent, and identify impact points that are cost-effective opportunities for change. Also consider how you can take advantage of past achievements and successes in stimulating future gains. Summarize your conclusions, in priority order, in an integrated list of targets for improvement, indicating what benefits are expected. This list will help you establish goals and directions for your action plans.

Targets for improvement	Benefits

Moving Forward

To see whether you can maintain the gains you have already made and achieve those you target for the future, you may want to schedule a follow-up assessment six months or a year from now. This will help you monitor your development and institute a regular system for self-review.

Knowing what your assets are now, and knowing how well the organization uses those assets, you can estimate how much the organization can achieve on its own. You may also want to take advantage of outside expertise that may be available to you. This includes local consultants, training programs, colleagues in related organizations, local institutions that understand family planning PVOs and assist them in various aspects of development, technical assistance available through international donors, and reference materials.

Meeting the Challenge

The tasks ahead may seem overwhelming. You can control them. If the choices you make accurately reflect what your organization can do, then the successes you enjoy will create an atmosphere of ongoing, positive change. That is the sign of a healthy, vital organization. Regardless of where you are starting from, you can develop that kind of atmosphere and make it work for your organization.

Appendix A

References

The books and pamphlets listed below may help you as you move toward a more in-depth assessment of certain of your organizational assets:

Managing the Non-Profit Organization. Manitoba Institute of Management.

MAPS Module on Organizational Design. Association of University Programs in Health Administration (AUPHA), Office of International Health Administration, Washington, D.C.

MAPS Module on Personnel and Human Resources Management. AUPHA.

MAPS Module on Financial Management. AUPHA.

MAPS Module on Community and External Relations. AUPHA.

MAPS Module on Patient Services Management. AUPHA.

MAPS Module on Materials and Facilities Management. AUPHA.

MAPS Module on Options Analysis and Implementation. AUPHA.

Anthony and Herzlinger, Management Control in Nonprofit Organizations, Richard D. Irwin, Inc., 1980 (Revised).

Guidelines for the Management Audit of Health Institutions in the Aga Khan Health Services System. Aga Khan Health Services Information Series No. 3.

Abramson and Halset, Planning for Improved Enterprise Performance: A Guide for Managers and Consultants, ILO, 1979.

CHAPTER II. IDENTIFYING YOUR ORGANIZATIONAL ASSETS

ASSETS	Existence A	Importance B 5 = most important 4 = pretty important 3 = somewhat important 2 = not very important 1 = unimportant	Quality C 5 = excellent 4 = good 3 = fair 2 = poor 1 = very poor
Workers			
Goals			
Programs			
Relationships			
Reputation			
Financial assets			
Facilities/equip.			
Information			
Systems			
Plans			

Chapter IV cont'd

MATCHES	MISMATCHES	PROBLEM	PRIORITY
---------	------------	---------	----------

FINDINGS AND CONCLUSIONS

STAFF WORKER PERFORMANCE INFORMATION WORKSHEET	
INFORMATION	SOURCE
1. Information now collected and used	████████████████████ ████████████████████ ████████████████████
2. Information available but not used	████████████████████ ████████████████████ ████████████████████

196.

STAFF WORKER PERFORMANCE ESTIMATE WORKSHEET

- 5 = outstanding
- 4 = very good
- 3 = acceptable
- 2 = substandard
- 1 = very poor

**JOB TITLE
(A)**

**PERFORMANCE RATING
(B)**

JOB TITLE (A)	PERFORMANCE RATING (B)

Chapter IV cont'd

VOLUNTEER WORKER-POSITION COMPARISON TABLE			
JOB TITLE	JOB FUNCTIONS (A)	SKILLS & OTHER CHARACTERISTICS NEEDED (B)	EXISTING SKILLS & OTHER CHARACTERISTICS (C)

142

VOLUNTEER WORKER PERFORMANCE INFORMATION WORKSHEET	
INFORMATION	SOURCE
1. Information now collected and used	████████████████████ ████████████████████ ████████████████████
2. Information available but not used	████████████████████ ████████████████████ ████████████████████

Chapter IV cont'd

VOLUNTEER WORKER PERFORMANCE ESTIMATE WORKSHEET

- 5 = outstanding
- 4 = very good
- 3 = acceptable
- 2 = substandard
- 1 = very poor

JOB TITLE
(A)

PERFORMANCE RATING
(B)

JOB TITLE (A)	PERFORMANCE RATING (B)

1994

<u>Characteristic</u>	<u>Rating</u>
	5 = highly developed 4 = well developed 3 = adequate 2 = poorly developed 1 = undeveloped

Chapter IV cont'd

<u>Present ability</u>	<u>Improvement targets</u>

Chapter IV cont'd

Opportunities for change	Benefits

CHAPTER V. ASSESSING THE ORGANIZATION'S GOALS

Opportunities for change	Benefits

CHAPTER VI. ASSESSING THE ORGANIZATION'S PROGRAMS

PROGRAM ASSESSMENT WORKSHEET

5 = very high
 4 = high
 3 = moderate
 2 = low
 1 = very low

FACTORS

PROGRAMS

1.								
2.								
3.								
4.								
5.								
All programs								

Chapter VI cont'd

Opportunities for change	Benefits

CHAPTER VII. ASSESSING THE ORGANIZATION'S NETWORK OF RELATIONSHIPS

NETWORK ASSESSMENT WORKSHEET		
		5 = very strong 4 = strong 3 = moderate 2 = weak 1 = very weak
Organization	Purpose of Relationship (A)	Strength of Relationship (B)

How Relationships Were Developed

What It Takes to Maintain Relationships

Chapter VII cont'd

Opportunities for change	Benefits

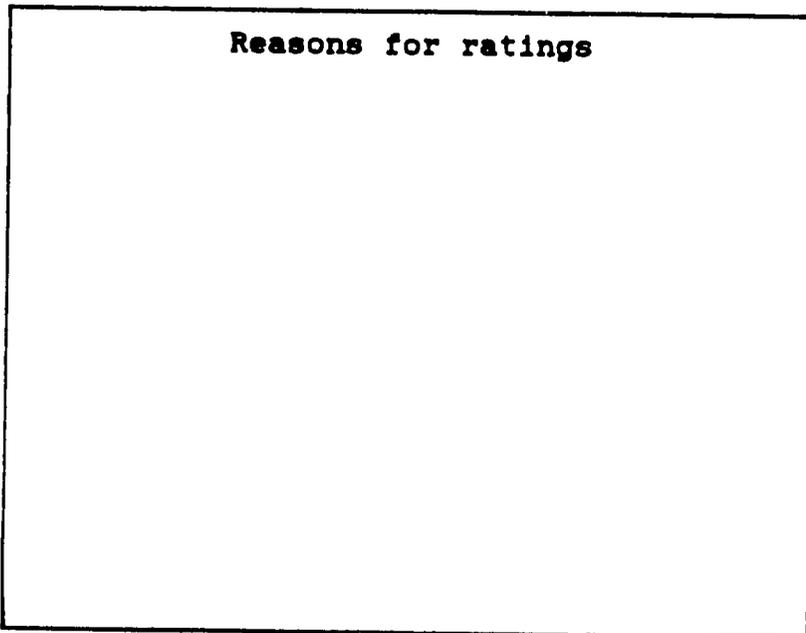
CHAPTER VIII. ASSESSING THE ORGANIZATION'S REPUTATION

Factors important to reputation

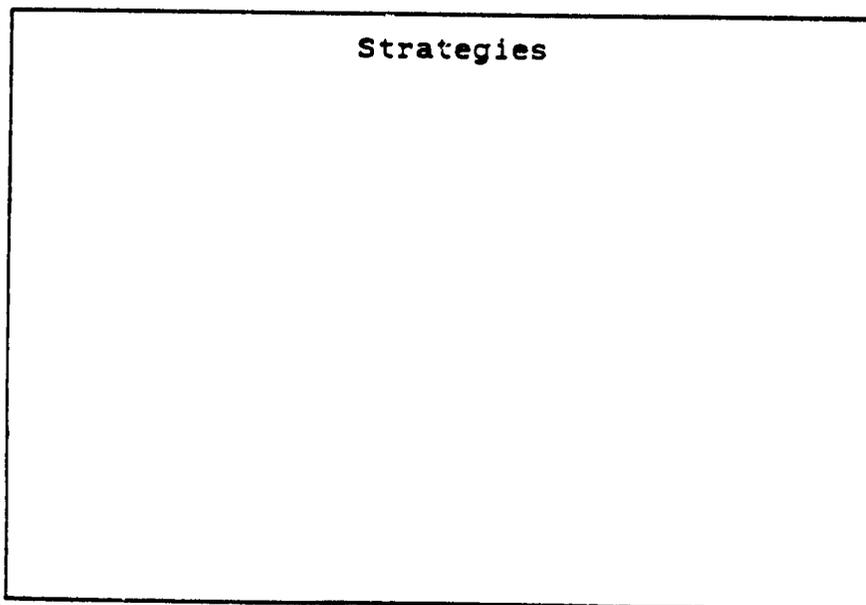
REPUTATION ASSESSMENT WORKSHEET	
	5 = excellent 4 = good 3 = fair 2 = poor 1 = very poor
Group (A)	Estimate of Reputation (B)

155

Reasons for ratings



Strategies



Chapter VIII cont'd

Opportunities for change	Benefits

CHAPTER IX. ASSESSING THE ORGANIZATION'S FINANCIAL ASSETS

FINANCIAL ASSET SUMMARY WORKSHEET		
Funding Source (A)	Amount (B)	Restricted (C)
Other Financial Assets		
In-kind Contributions		

105

EXPENDITURE CATEGORY WORKSHEET	
Categories (A)	Amount Spent (B)

12/1

Opportunities for change	Benefits

CHAPTER X. ASSESSING THE ORGANIZATION'S FACILITIES AND EQUIPMENT

FACILITIES AND EQUIPMENT ASSESSMENT WORKSHEET		
Category	User-Uses	Estimated Maintenance Costs
(A)	(B)	(C)

Conclusions about uses

FUTURE FACILITIES AND EQUIPMENT PROJECTION WORKSHEET		
Category	User-Uses	Estimated Maintenance Costs
(A)	(B)	(C)

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Opportunities for change	Benefits

CHAPTER XI. ASSESSING THE ORGANIZATION'S INFORMATION ASSETS

INFORMATION ASSESSMENT WORKSHEET				
Information (A)	Have? (B)	M/P (C)	Source(s) (D)	For whom?/Why? (E)
Information needed:				
Information collected but not needed:				

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Chapter XI cont'd

Opportunities for change	Benefits

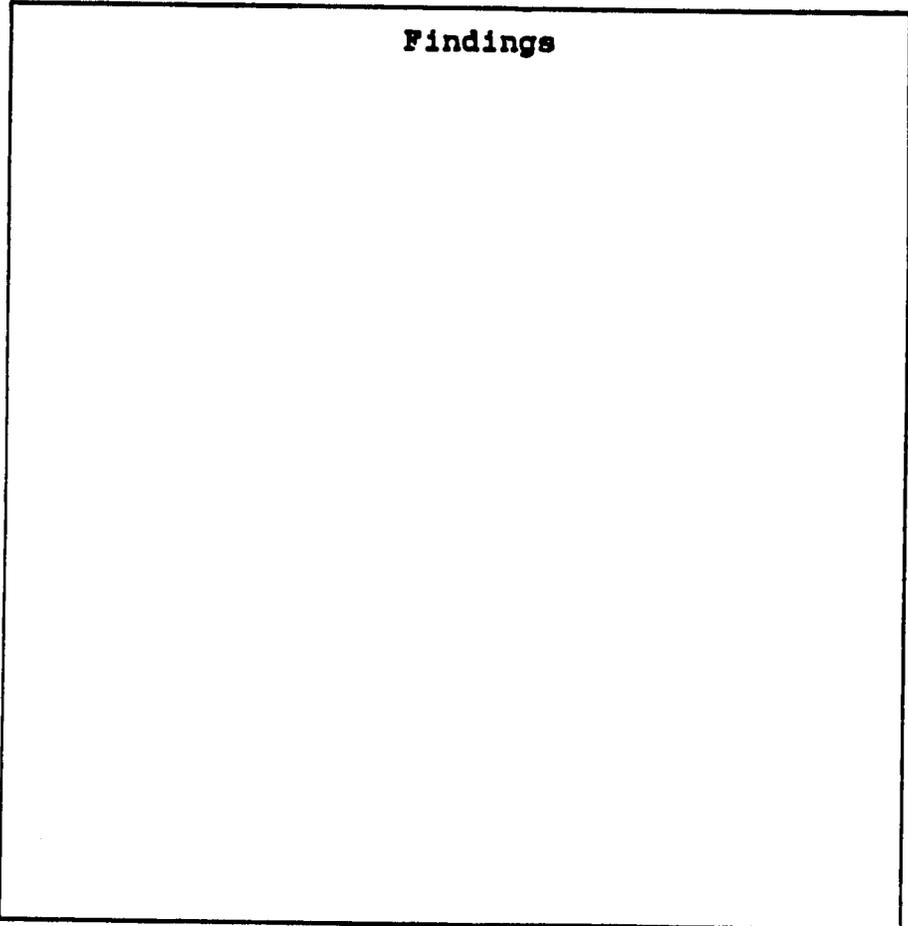
Chapter XII cont'd

<u>New Systems Needed</u>	<u>How They Would Help</u>

Opportunities for change	Benefits

CHAPTER XIII. ASSESSING THE ORGANIZATION'S PLANS

Findings



Chapter XIII cont'd

Opportunities for change	Benefits

CHAPTER XIV. FOLLOWING THROUGH

ASSETS	Existence	Importance	Quality
	A	B	C
		5 = most important 4 = pretty important 3 = somewhat important 2 = not very important 1 = unimportant	5 = excellent 4 = good 3 = fair 2 = poor 1 = very poor
Workers			
Goals			
Programs			
Relationships			
Reputation			
Financial assets			
Facilities/equip.			
Information			
Systems			
Plans			

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Targets for improvement	Benefits

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