SHIA • Tool for organisation analysis

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Introduction

The overarching objective of international development cooperation in the partnerships that are conducted by SHIA’s 26 member organisations is to reduce poverty through strengthening and supporting the formation of disabled peoples’ organisations. Disabled peoples’ organisations are in a unique position to reduce poverty and influence development in their respective countries. The starting point for SHIA’s work is the mutual conviction that long-term, sustainable development is based on the opportunities that people have to join organisations in order to attain full inclusion and equality in their respective societies.

In order for an organisation to be able to develop and support its members, the desire for change and development must come from within the organisation itself. Even though support and exchange with other organisations is a good thing, the responsibility and desire to develop must be present in the actual organisation. For this to be possible, the organisation must have a clear understanding of what needs to be changed, and which parts of the organisation need to be developed and reinforced.

SHIA’s tool for organisation analysis has been developed in order to be able to see which parts of the organisation need to be strengthened. The result is helpful in finding out what it is important to concentrate on in order for the organisation to become stronger, and also functions as an instrument to evaluate the effects of development cooperation. By carrying out the organisation analysis before the project starts, and then redoing it when the project is approaching the finish, it is possible to measure whether the cooperative project has produced any effects.

Through discussion, taking a position on and evaluating the different statements in the tool, it becomes possible to see what the organisation is good at, and what it is
not so good at. The results show what it might be necessary to develop and strengthen.

For optimum results, it is important to regard this as an opportunity to learn something new, and that it is a way of getting a dialogue started on organisational development.

It is also important to be aware that the statements are not truths, but simply statements on which to take a position. And neither is it the case that low average values mean that an organisation is not functioning properly. It is the organisation itself which has to decide which areas need to be developed for it to function in the best way, in accordance with the goals it has set for itself.

Organisation analysis addresses eight fundamental aspects of an organisation’s work, and consists of a collection of statements that have to be discussed and evaluated according to a 7-degree scale. An average value for each one of the eight parts is calculated by adding up the values each statement receives and dividing by the number of statements.

The eight fundamental parts are
- The organisation’s idea
- The organisation’s structure
- The organisation’s operation
- The relevance of the operation
- The organisation’s expertise
- Systems and financing
- The organisation’s relationship with its members
- The organisation’s relationship with the world at large
Carrying out an organisation analysis

To obtain the best possible results, it is a good idea to carry out the organisation analysis in small groups. The time needed can vary, but it usually takes half a day to a day. It is important that the participants represent different parts of the organisation – members, management, employees, etc. It is also good if the participants are representative of the organisation in terms of proportion of women and men, different ages, ethnic or religious affiliation, and so on. A recommended number of participants per group is between five and eight persons.

It is not unusual for the participants to feel uncomfortable or tense at the prospect of openly discussing their opinions about the organisation. Consider for example that it can be difficult for women to state their opinions openly in a group consisting of both men and women, for young people to say what they think in front of older people, or for employees to have discussions together with the organisation’s management.

Facilitator and secretary

One person in each group is designated as facilitator, to lead the group by going through the statements, allocating who is to speak and leading the discussion forward. One person is designated as secretary with responsibility for writing down comments and the values arrived at, along with any questions that might arise.

Before the group begins its work, the eight sections of the organisation analysis have to be presented. It is important to go through the concepts, explaining points that are not clear and discussing together the way the work is arranged. It is also important to clarify the aim of the discussions – it will either involve a preparatory analysis for cooperation that is ongoing, or an evaluation of a cooperative project that has already been implemented.

The basis for the discussions is the statements that are to be found in the tool. The facilitator reads out one statement at a time, and the group arrives at a common value for how well this statement corresponds to the situation within the organisation. When the group is in agreement on a common value this should be commented on: Why has this value in particular been selected? The secretary is responsible for documenting both the value and the comments.

The figure itself says very little, however the supporting comments provide opportunities to follow-up and develop various areas. It is also good if any unclear points or differences of opinion are documented as comments.
When all the statements under one area have been evaluated and commented on, an average value is calculated. If several groups have been working, a common average value is calculated. Any differences there might be between the groups’ valuations should be documented.

When all the areas have been discussed and evaluated it is time to analyse the results: Which areas have been given high values, which have been given low ones? Why is it like this? Do we want to change anything? Which areas should we start working with? Why do we want to prioritise these ones? How are we going to plan the operation based on the results that have emerged.

The results of the organisation analysis can represent a concrete basis for a project. It can also be used for following-up and evaluating the project.

**To consider**

In order to obtain a result that is as satisfactory as possible, it is important to play down the method and emphasise that it is a learning opportunity with the aim of getting a dialogue started about organisational development on the first occasion of working with organisation analysis.

It is also important to bear in mind that the areas and statements are only examples, and not facts. It can be beneficial to add and discuss other areas if there is a perception that this is needed.

It is not necessary for all organisations to have high values in all areas in order to be functioning properly. It is the organisation itself which must assess which areas it needs to strengthen in order to function as it wants to, or in order to become better at what it is supposed to be doing.
Statements for the organisation analysis

Make a decision on every statement, and give it a value. The scale of values is 1-7, where seven means that the statement is in complete correspondence with the situation within the organisation, and one means that it does not correspond at all. Arrive at a common value in the group. The average value for each area is calculated by adding together the values for all statements and dividing by the number of statements. The comments are important for follow-up of the organisation analysis. Write them down under the respective areas at the very bottom of each page.

1. Idea

Idea concerns the aim of the organisation, why the organisation exists, what it stands for, and what it wants to achieve. Idea is also about which goals the organisation has, and whether members and employees are familiar with and accept those goals.

- The organisation has long- and short-term goals that are approved and in writing.
  Value:

- The members are familiar with the aim of the organisation and what it exists for.
  Value:

- There are clear, written strategies and methods as to how the organisation should work.
  Value:

- We usually discuss strategies and methods as to how the organisation should function.
  Value:

Average value Idea – 4 statements

Comments
2. Structure
An organisation’s structure concerns the way in which the organisation allocates responsibilities and tasks, how it ensures that everyone is able to participate: Women and men, girls and boys, young and old.

- The organisation has a clear structure and a clear allocation of responsibilities and tasks.
  Value:

- The board and the employees have clearly demarcated tasks which are written down in job descriptions or similar.
  Value:

- The members can demand that the board takes responsibility, and can dismiss its members if they feel that they are not doing a good job.
  Value:

- There are frequent occasions when all members of the organisation are given the opportunity to discuss the work and orientation of the organisation and together make decisions about it.
  Value:

- The composition of board members and employees reflects the overall make-up of the organisation with regard to the proportions of women and men, old and young, different religious groups, etc.
  Value:

Average value Structure – 5 statements

Comments
3. Operation

covers which activities are carried out in order to achieve the goals that are set out in the organisation’s idea. This shows whether the organisation is converting the ideas into practical action.

- The organisation’s operation contributes to the members having better living conditions
  **Value:**

- All members enjoy equal opportunities to participate in the operation – irrespective of sex, age, religious or ethnic affiliation.
  **Value:**

- There are concrete, written plans as to how the organisation is to carry out the operation that has been decided.
  **Value:**

- The organisation reports how and if the planned operation has been carried out, and learns from it.
  **Value:**

**Average value Operation – 4 statements**

**Comments**
4. Relevance
Do the activities that are carried out contribute to achieving the goals? Do the planned activities correspond with that which the organisation claims it wants to achieve?

- The activities that are carried out have a clear connection to the organisation’s fundamental idea.
  Value:

- Continuous discussions are held on the best way to work to ensure that the operation corresponds with the organisation’s idea.
  Value:

- The members participate in formulating and deciding on the operation.
  Value:

- The working methods are evaluated on completion of an operation.
  Value:

- The organisation works actively in the operation to develop methods.
  Value:

**Average value Relevance – 5 statements**

**Comments**
5. Expertise
Expertise is to do with whether the people who work in the organisation have the correct prerequisites for their work, whether the organisation has access to the expertise it needs to attain its goals: Whether the right person is in the right position. Expertise does not need to be the same thing as formal education, it also involves other kinds of knowledge, abilities and experience.

- The board and the employees have the expertise they need to carry out their tasks – we have the right people in the right positions.

Value:

- Open discussions are held concerning which type of expertise we need, and how we can acquire that expertise.

Value:

- We have regular meetings at which we discuss the work situation within the organisation.

Value:

- We have an idea and a strategy as to how we should recruit new personnel.

Value:

- There are representatives for the organisation’s target group among the employees.

Value:

Average value Expertise – 5 statements

Comments
6. Systems and financing
Most organisations are dependent on financial support to enable them to pursue their operation. This sections deals with the capacity the organisation has to acquire financial support, but also how realistically the organisation perceives its own ability to carry out its activities. In addition it concerns which systems and routines there are for financial follow-up and control within the organisation.

- The organisation has financing from several different locations.
  Value:

- There is a good level of knowledge within the organisation on how to apply for funds.
  Value:

- The planned operation is realistic in relation to the financial resources that are available.
  Value:

- All income and expenditure is entered into the books.
  Value:

- The organisation’s overall financial position is reported in an annual statement of accounts.
  Value:

**Average value Systems and financing – 5 statements**

**Comments**
7. Relationship with the members
How do the members view the work of the organisation? Are they satisfied with what the organisation is doing and with the information they receive? Do they trust the elected representatives? Or do they have another perception of what should be done?

- The organisation’s target group is clearly defined.
  Value:

- The organisation carries out frequent activities for the members.
  Value:

- The organisation carries out activities to encourage the members to take part in the operation.
  Value:

- The members are able to make their voices heard.
  Value:

- We enjoy close contact with our members and keep them well informed about the operation.
  Value:

**Average value Relationship with the members – 5 statements**

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8. Relationship with the world at large
deals with the way in which the organisation interacts with the world at large. Is the organisation known and respected? Does the organisation cooperate with other organisations? Is the organisation actively involved in various networks?

- The organisation has a lot of contacts with other parties.  
  **Value:**

- The organisation is well known.  
  **Value:**

- We work actively to disseminate our message and conduct a continuous dialogue with other organisations, institutions and authorities.  
  **Value:**

- The organisation participates in national and international networks.  
  **Value:**

- Our operation has been mentioned in the media – that is to say in radio, TV or the press.  
  **Value:**

**Average value Relationship with the world at large – 5 statements**

**Comments**