What are Organizational Assessments? How are they conducted?
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I.   What is an Organizational Assessment?

An Organizational Assessment is an appraisal or valuation an organization. This is done with ratings.

A comprehensive organizational assessment takes a look at the overall climate and areas of team conflict and/or dysfunction by conducting one-on-one interviews with all staff members as well as with the management team to help it find more effective ways of resolving the conflicts within the organization.

Every organization should strive for Performance Excellence.

Organizational assessments include:
- o   Assessing the current climate and provide a written report of findings;
- o   Identifying underlying factors contributing to any issues identified;
- o   Recommending interventions designed to improve employee morale and performance; and
- o   Conducting interventions as agreement by the management team and other leadership.

Organizational assessments should also include recommended, possible interventions such as:
- o   Conducting teambuilding or team conflict intervention to get the issues out on the table for resolution, and facilitate group discussions of the problems to get at viable solutions;
- o   Conducting independent competency assessments to provide developmental feedback to staff members and to measure progress toward developing more advanced skills; and
- o   Providing coaching to the management team on more effective ways to approach any skills gap problems.

Many organizations strive for Quality Excellence Awards. A popular award is the Malcolm Baldrige National Quality Award administered by the Baldrige Performance Excellence Program, which is based at and managed by the National Institute of Standards and Technology (NIST), an agency of the U.S. Department of Commerce. The Baldrige National Quality Program and the associated award were established by the Malcolm Baldrige National Quality Improvement Act of 1987. Malcolm Baldrige, who served as United States Secretary of Commerce during the Reagan administration.

Organizations need to promote and share successful performance strategies and benefits derived from using performance excellence strategies. To receive a Baldrige Award, an organization must:
1. Have a role-model organizational management system that ensures continuous improvement in delivering products and/or services;
2. Demonstrate efficient and effective operations; and
3. Provide a way of engaging and responding to customers and other stakeholders.

II.   How are Organizational Assessments Conducted?

Organizational assessments involve surveying an organization's stakeholders to find out what their opinion of the organization is.

- Organizational leaders, middle managers, line staff, clients, customers, and vendors are asked in person or by survey documents what their opinion of the managerial practices.
- Customers are asked what they think about customer service.
- Vendors are asked what they think about internal operations.
- Employees are asked about one another in peer reviews.
- Community leaders are asked for their opinion.
- The organization's funding agency representatives are asked for their opinion.

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Organizational Assessments should be conducted annually. Typically, a series of surveys and face-to-face interviews are conducted. This activity is followed by a retreat to discuss the findings.

An Organizational Assessment retreat can include fun team building activities.

Participants should be given an Organizational Self Assessment Quality Management Reference Manual.

A great Organizational Assessment tool is the Malcolm Baldrige Organizational Self-Assessment. It includes 3 components: Strategic Planning based on a Scorecard; Performance Improvement; and a Self Assessment using Baldrige Criteria for Performance Excellence.

A Malcolm Baldrige Organizational Self Assessment is an integrated approach to performance management that results in:

- delivery of ever-improving value to customers and stakeholders, contributing to organizational sustainability;
- improved organizational effectiveness and capabilities; and
- organizational and personal learning.