



## Effective organisations are constantly and consistently evaluating their effectiveness on many levels.

A review and evaluation of how things are going is important to an organisation for:

- Continuous improvement
- Meeting changing expectations
- Accountability to funders and contracts
- Ensuring you are making a difference.

Evaluation occurs on many levels and should be viewed as a normal part of any activity.

### Individual and team

Encourage every member of the team to evaluate their effectiveness in their role. Encourage conversations at meetings that openly discuss, without blame, how projects and activities went and if they could be improved.

Encourage a culture of helping colleagues to improve their effectiveness and working together to develop solutions.

Regular performance reviews are part of self-evaluation and are a valuable tool in managing people and encouraging personal development.

Governance teams can review their effectiveness by assessing meeting effectiveness, decision-making, individual contributions to the activities of the organisation and the organisation's results.

### Programme evaluation

Your organisation will be required to measure the effectiveness and impact of your activities to meet contractual obligations, but regardless of contractual obligations every initiative should be evaluated regularly to ensure it remains effective and relevant.

To effectively evaluate a programme or a project, you first need to understand what was intended. Therefore, it is important that you have clarity about the purpose of the programme, that there are sufficient measures in place and that key performance indicators (KPI's) are relevant and can be measured.

Ideally, you will evaluate effectiveness on a regular, or continuous basis, by monitoring your KPI's and creating a management report for the governance board that clearly shows achievement (or not) of critical KPI's. This report should include a few key measures that can be easily quantified and reported to alert the organisation to potential challenges.

Regular surveys of clients and/or other stakeholders is an effective way of monitoring trends and impact of a programme or activities. Designing a survey can be daunting, there are lots of templates out there. Check out [surveymonkey.com](http://surveymonkey.com) and [whatworks.org.nz](http://whatworks.org.nz) both these sites have free templates. You need to establish what it is you are evaluating and for what purpose before you commence. This way you can ensure your survey generates useful information.

You can provide more depth to an electronic survey by conducting focus groups either before or after conducting your survey. Focus groups can be costly and time consuming, but do provide more depth and understanding to support a survey.

**At its simplest level a survey will help you to find out:**

- Have we done what we said we were going to do?
- Has our activity made the difference we expected it to?
- Do our clients/ stakeholders agree with us?

Evaluation is a management tool that provides an organisation with valuable information to improve processes. Any initiative that you undertake has used valuable resources of time, money and equipment.

The PDCA (Plan, Do, Check, Act) cycle of continuous improvement demonstrates how to ensure you are learning from mistakes, getting the results you expected and using those resources wisely.



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## Organisational evaluation

This process is carried out annually to determine if the systems you have in place are effective, the infrastructure is sufficient to do what you want to do and if there are any changes you need to be aware of. This review fits well with the strategic planning and budgeting cycle as information from one will inform the other.

**To carry out an evaluation of your organisation there are a number of questions you can ask:**

- Have we met all our contractual obligations?
- Where are our problem areas/challenges?
  - KPI's not met
  - Capability
  - Non-conformances
  - Customer complaints
  - Incidents.
- What changes are we facing?
  - Contractual
  - Legislative/regulatory
  - Social/demographics
  - Funding.
- What have we done well?
- What feedback have we had from staff, from clients?
- What are other organisations in our field doing, saying?

**Information from this review can then be added to your strategic planning information (SWOT analysis) to create a plan of action for the coming year (or more).**

### MORE INFO



What works

[whatworks.org.nz](http://whatworks.org.nz)

CommunityNet Aotearoa

[community.net.nz](http://community.net.nz)

Sport NZ

[sportnz.org.nz](http://sportnz.org.nz)

Survey Monkey

[surveymonkey.com](http://surveymonkey.com)