

SELF-ASSESSMENT AND IMPROVEMENT PLANNING

Two very important activities in the implementation and annual maintenance of the Organizational Excellence Framework (OEF) are self-assessment and improvement planning.

What is self-assessment? Self-assessment compares the organization to the principles and best management practices of the OEF and identifies strengths and opportunities for improvement.

The 'principles' of the OEF describe the culture of the organization - the way people work together. To self-assess the principles, we ask the employees to use a qualitative rating system (high, medium, low) to denote the extent to which the principles are deployed.

The 'best management practices' describe the way the work is done across key management areas. To self-assess the best management practices, we ask the employees to use a qualitative rating system (%) that reflects the extent to which each practice is deployed, understood, documented, and improved. In addition to the rating score, we also ask employees to keep notes of their discussion as these notes serve to validate the rating.

The resulting assessment scores and notes show where an organization sits at a particular window in time and provides a good summary of the organization's strengths and opportunities for improvement.

What is improvement planning? The improvement plan identifies the gaps or best management practices that need to be improved and provides an action-oriented plan to accomplish such.

The results of the self-assessment are used to develop the improvement plan. For each best management practice that received a low rating, we ask employees to prepare an action plan that will be undertaken to strengthen it. Each action plan identifies the best management practice and includes a chronological list of activities to be undertaken, timing, responsibility, method of measurement, and out-of-pocket costs. When the action plans are complete, a gantt chart is prepared to show the entire improvement plan at a glance.

Tips for successful implementation of the improvement plan are to:

- Set an overall timeframe that is appropriate for the organization
- Identify ways to maintain momentum
- Assign overall responsibility to an Excellence Manager
- Ensure that all employees have a role to play
- Establish a regular meeting schedule to gauge progress
- Communicate results throughout the organization
- Celebrate achievements

How often should this exercise be undertaken? The self-assessment and improvement planning process should be an annual exercise. Essentially, the process is just like a visit to the doctor and

provides a check- up on the health and functioning of the organization and results in a plan that assists with continual improvement.

Would you like a quick check up on your organization? Contact us to discuss assessment and improvement planning. We have three options to choose from depending on your requirements:

- Online survey instrument – is administered to 1 or more people in the organization and provides a ‘high level synopsis’ of the degree to which the organization has the OEF in place and highlights key strengths and opportunities for improvement across key management areas
- Workshop – is facilitated by a licensed professional and uses a more detailed and hands on approach. The workshop involves management and staff and provides an overview of the OEF, engages participants in a self-assessment of the organization against the OEF, and concludes with the preparation of an improvement plan to address gaps
- Third-Party Assessment – is conducted by one of our licensed professionals and involves a walk-through of the organization, interviews with management and staff, and a review of the way work is done. An independent and objective feedback report is prepared for the organization that rates the degree to which the organization has the OEF in place and summarizes key strengths and opportunities for improvement across key management areas

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The Organizational Excellence Framework is a unique publication that ‘consolidates’ the principles and best management practices from global excellence frameworks and provides ‘implementation guidelines’ and additional resources for the practitioner.

Organizational Excellence Specialists work with organizations to improve performance and make a positive contribution to productivity.