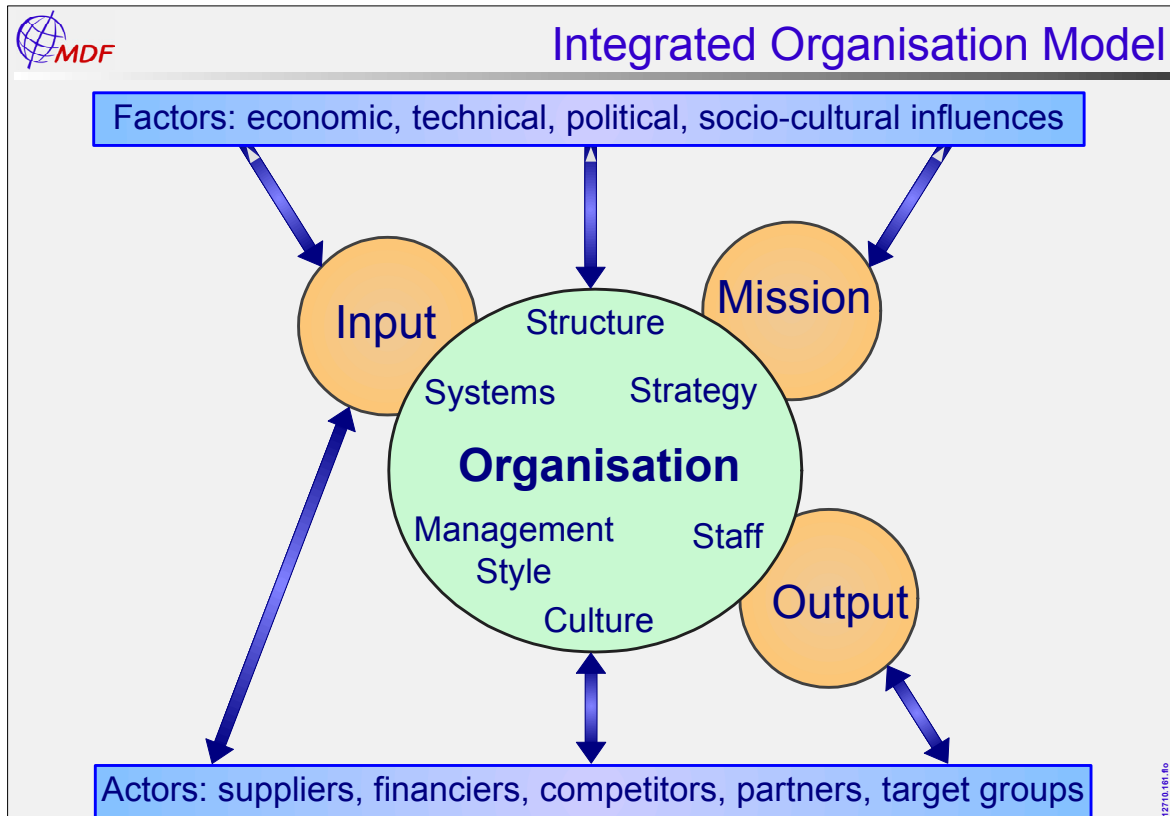


[This tool presents a checklist of questions regarding organisations, linked to the Integrated Organisation Model. The Integrated Organisation Model (IOM) is a model that can be applied to describe, to analyse and to diagnose organisations. The IOM is an integrated (or integral) model to emphasise the interrelationships of the different elements of an organisation: although the elements can to a certain extent be treated separately, they are all connected to each other and - ideally - in balance. When there is no or no clear fit between the different elements within an organisation, the organisation will not function optimally and the need for organisational change will be (or become) apparent.



The IOM offers an overall tool to put the various elements of an organisation in their place, be it a government department, a non-government organisation, a local government, a people's organisation or a private enterprise wherever in the world. If you look at organisations using this model you wouldn't overlook the most important elements.

Organisation Assessment: IOM checklist

What is it?

The IOM checklist is a list for inspiration and suggestions concerning the elements to look into when analysing an organisation in its context. The aim of the checklist is to assist in analysing an organisation from different points of view; it *broadens and deepens* ones understanding of the situation. It is not an exhaustive list; it merely triggers to pose new questions. Working with this checklist is therefore referred to as 'Second level of analysis'.

What can you do with it?

Results

- A impression of the strong and weak points of the organisation
- A comprehensive impression on the balance and match between the elements
- A list of issues for further investigation

When to use it?

The IOM checklist can be used at various stages in the diagnostic process:

- At the start, to review where there are bottlenecks, and to which other elements these bottlenecks are related
- During the analysis, to check whether the fact-finding and analysis are still balanced in terms of focus and comprehensiveness
- At the time of assessment, to order and interpret the collected information

Requirements and limitations

The checklist is not complete. It raises common as well as often overlooked issues, but does not cover everything that could possibly be relevant about the various IOM elements. Moreover it does not give insight in which elements and aspects are crucial under particular circumstances. It should therefore support rather than replace common sense thinking.

IOM Checklist

Relevant questions need to be selected and adapted based on the organisation and the basic questions concerned.

	Positive (+)	Neutral (±)	Problem (-)	Unknown (?)
01.0 MISSION				
01.1 Is the mission clearly formulated?				
01.2 Is the mission relevant to the situation of the beneficiaries?				
01.3 Is the mission understood & accepted by stakeholders?				
01.4 Is the mission clearly supported by the staff & management?				
01.5 Is the mission adequately translated into long term objectives?				
01.6 Is the organisation legally registered?				
01.7 Does the organisation have a clear constitution?				
02.0 OUTPUTS				
02.1 Does the organisation offer a relevant range of products/services?				
02.2 Do the products and services adequately address the needs of the target groups?				
02.3 Are the existing products/services in line with the mission and long term objectives?				
02.4 Do products/services adequately address the different gender roles and positions of the target group?				
02.5 Is there sufficient demand for these products/services?				
02.6 Does the organisation deliver a substantial volume of outputs?				
02.7 Can the organisation meet the demand for its products/services?				
03.0 INPUTS				
03.1 Is there a sufficient number of staff?				
03.2 Is there sufficient skilled staff?				
03.3 Are premises and equipment adequate?				
03.4 Is the location of the premises adequate?				
03.5 Are offices and equipment adequate?				
03.6 Are supplies of sufficient quality?				
03.7 Are services of third parties adequate (water, electricity, accountancy, etc.)				
03.8 Are financial means adequate?				
03.9 Is the organisation able to fulfil its short-term debts?				
03.10 Are there major financial risks and are they covered?				
03.11 Is there sufficient access to necessary information?				
03.12 Are inputs adequately utilised considering the volume and quality of outputs?				

	Positive (+)	Neutral (±)	Problem (-)	Unknown (?)
04.0 ACTORS				
04.1 Is the target group satisfied with the quality of products and services delivered?				
04.2 Is the target group satisfied with the volume of products and services delivered				
04.3 Is the organisation satisfied with the relations with financiers/donors?				
04.4 Are the financiers/donors satisfied with the results?				
04.5 Are relations with other agencies adequate?				
04.6 Has the organisation adequate relations with policy makers in the region and country?				
04.7 Has the organisation a good public image?				
05.0 FACTORS				
05.1 Is the socio-economic situation conducive to the performance of the organisation?				
05.2 Is the legal framework conducive to performance?				
05.3 Are socio-cultural norms and values among the target group and in society conducive to performance?				
05.4 Is the physical environment (climate, infrastructure) conducive?				
05.5 Is the political climate conducive?				
06.0 STRATEGY				
06.1 Is the strategy in line with the mission?				
06.2 Is the strategy clear and realistic?				
06.3 Is the strategy translated in a clear, realistic annual plan?				
06.4 Is the annual plan regularly monitored and adapted?				
06.5 Did the organisation realise earlier annual plans and budgets?				
06.6 Is there a clear and effective work planning?				
06.7 Is the plan of work monitored?				
06.8 Is the staff adequately involved in planning and monitoring?				
06.9 Do strategies and plans address gender differences among the staff and target groups?				

	Positive (+)	Neutral (±)	Problem (-)	Unknown (?)
07.0 STRUCTURE				
07.1 Is the decision making structure based upon a clear division of responsibility?				
07.2 Is the division of tasks and responsibilities clear and understood by the staff?				
07.3 Is there a logical division in departments and units?				
07.4 Is the logistical support adequately arranged?				
07.5 Is there sufficient co-ordination between departments/units?				
07.6 Is there sufficient communication between management levels?				
07.7 Is there an adequate balance in the position of men and women in different units and levels?				
08.0 SYSTEMS AND PROCESSES				
08.1 Are financial/administrative procedures adequate?				
08.2 Does the organisation adhere to its procedures?				
08.3 Are working methods/approaches adequate?				
08.4 Are working methods/approaches followed by the staff?				
08.5 Is there an adequate planning system?				
08.6 Is there a good system for monitoring and evaluation?				
08.7 Are realistic monitoring indicators developed?				
08.8 Is there sufficient attention to quality control?				
08.9 Is sufficient information about performance easily available?				
08.10 Is there an adequate reporting system (financially, non-financially)?				
08.11 Is there a positive audit report on the last year?				
08.12 Are recommendations of the auditor being implemented?				
09.0 STAFF				
09.1 Is staff performance adequate, considering the circumstances?				
09.2 Are the staff salaries and secondary benefits adequate?				
09.3 Is the performance of staff reviewed periodically?				
09.4 Is performance adequately linked to salaries and benefits?				
09.5 Are recruitment procedures adequate?				
09.6 Is the staff turnover within normal limits?				
09.7 Is the staff adequately utilised?				
09.8 Are there adequate staff development activities?				
09.9 Do the staffs have sufficient career perspectives?				
09.10 Does the staff policy adequately address gender differences?				

	Positive (+)	Neutral (+/-)	Problem (-)	Unknown (?)
10.0 MANAGEMENT STYLE				
10.1 Is concern of management adequately divided over internal and external relations?				
10.2 Is attention of management adequately divided over quality and volume of outputs?				
10.3 Is concern of management adequately divided over people and means?				
10.4 Is concern of management adequately divided over relations with staff and task performance?				
10.5 Is there adequate balance between giving responsibilities and control?				
10.6 Are decisions taken in time?				
10.7 Is staff adequately involved in decision making?				
10.8 Is the staff adequately informed on decisions?				
11.0 CULTURE				
11.1 Is there an adequate balance between hierarchy and participation?				
11.2 Is there an adequate balance between attention to performance and concern for people?				
11.3 Is there an adequate balance between short and long-term thinking?				
11.4 Is there an adequate balance between risk taking and risk reduction?				
11.5 Is there an adequate balance between individual responsibility and team spirit?				
11.6 Is adequate attention paid to accountability and transparency?				
11.7 Is there adequate attention to inequalities (gender differences & minority groups)?				
11.8 Is the organisation willing to learn from its past mistakes?				