



OVERVIEW & ANALYSIS

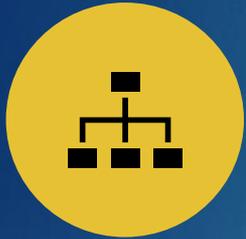
# Self- Assessment



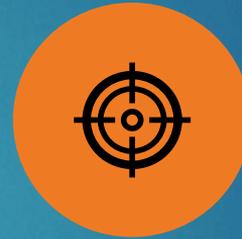
**PROPERTY  
INSTITUTE**



# What is self-assessment?



Self-Assessment enables organisations to determine where they are on their journey towards best practice and plan out the next steps too ongoing organisational improvement.



The self-assessment criteria are based on determining your current position against fundamental best practice industry concepts of excellence. For each concept, there is a definition describing what we would expect to see in an organisation both at a policy and procedure level and also what types of evidence will need to be demonstrated to prove competency within a specific organisational focus area.



By rating your current level of competency, you can get a very quick overview of your strengths and potential areas of improvement. Self-assessment incorporates the ongoing processes an organisation can use to engage in systematic, evidence-driven, self-evaluation.



The self-assessment criteria are based on an organisation demonstrating their strategic direction and purpose, adhering to governing legislation and/or standards, developing and managing their governing documentation and/or quality management systems. The outcome of the self-assessment should allow an organisation to develop a strategic plan of ongoing organisational improvement.



To be effective, self-assessment needs organisational ownership and leadership so that it is a routine part of business as usual including business and strategic planning.

**Key features of effective self-assessment are:**

- ▶ It should be comprehensive, authentic, transparent, and robust.
- ▶ It is self-reflective and outcome focused.
- ▶ It includes self-evaluation for planning and improvement purposes across the organisation.
- ▶ It highlights actual improvement so focuses on achievements and areas where best practice has already been met.
- ▶ It is directed towards coherent and clearly articulated goals to inform decision-making and operational practices.
- ▶ It reduces the complexity of external review or audit, as it highlights focus areas for review rather than the requirement for full a full audit. This also allows for the external evaluation and review process to be relatively non-intrusive.

## How to implement an effective self-assessment model

Self-assessment should involve the whole organisation and once it has been effectively implemented it will allow you to have an informed understanding of your organisation including:

- ▶ What is being achieved directly and indirectly within your organisation.
- ▶ What influences organisational decision-making.
- ▶ What you will need to prioritise in regards to future planning and organisational resourcing.
- ▶ How to identify and highlight your strengths and manage your weaknesses.

There are many approaches to evaluating, but most use quantitative and qualitative data to better understand what is happening within a organisation. Using multiple data sources enables a deep level of understanding to be gained by staff engaged in the process.

## Methods of evaluation involve:

- dialogue, reflection, questioning and interpreting data and evidence. In addition, evaluation includes identifying and clarifying beliefs, and challenging assumptions and knowledge.
- An organisation may use evaluative self-assessment to explore an aspect of their business they want to know more about. The organisation needs to plan over a period of time to cover the whole business.
- Use open-ended evaluation questions can provide a useful starting point for self-assessment i.e. How do we know we are meeting sales targets? or How do we know our customers are satisfied or How do we know our staff have been correctly inducted and are aware of current Health and Safety procedures?

## Indicators can also be useful for an organisation to:

- define their scope of self-assessment activity or activities
- frame some evaluative conversations
- identify strengths, areas for improvement, and opportunities for innovation.



# Self-Assessment Checklist.

You will receive a self-assessment checklist to assist with completing your internal self-assessment review. The checklist has been broken down into several focus areas:

- ▶ Governance & Management
- ▶ QMS/Self-Assessment & Administration
- ▶ Products & Services
- ▶ Commissioning Jobs and Contracting for Service
- ▶ Undertaking Valuations
- ▶ HR & Staff Health & Safety

Each focus is then broken down into sections of criteria, and each section of criteria has a range of suggested evidence and/or evaluation questions listed against each one.

Remember this self-evaluation exercise is **not an audit**, it is a method of identifying your organisational strengths and weaknesses to assist with ongoing improvement. The outcomes and findings should not reflect 100% perfect organisational performance, they should simply give you a clear and factual picture of how your organisation is functioning and that you understand your strengths and weaknesses. The goal of this exercise is to give you all the information you need to make sound and accurate decisions to allow you to improve and grow your organisation.

# Example Self-Assessment Form



## Quality Assurance Self-Assessment Form

Focus Area	Criteria	Evidence includes but is not limited to	Yes/No	Notes/Findings/Outcomes
Governance & Management	The accredited firm has a mission statement.	- Staff are aware of mission statement and how it is implemented.		
		- Mission statement is reviewed annually to ensure it is still fit for purpose.		
	The accredited firm has an overarching philosophy about their general business practice.	- Staff are aware of the overarching philosophy and their contribution to it as an employee.		
		- Evidence of meetings and activities that support the firm's philosophy are recorded and reviewed annually.		
	The accredited firm has defined their scope of practice and works within this scope.	- A scope of practice has been identified and defined that clearly outlines the geography and types of key business services offered.		
	The accredited firm has identified legislation that applies to them and Staff can explain how the legislation impacts on their business.	- A list of legislation is available which describes the purpose of the legislation.		
		- Nominated Staff are able to explain how legislation identified in the quality system impacts on their business.		
	The accredited firm identifies delegated approvals and authorities across the firm.	- A list of employees and delegated approvals has been developed and documented.		
The accredited firm has established goals and objectives	- Goals and objectives relevant to the size and scope of the business have been developed/reviewed and show clear intent and are measurable.			
	- Annual strategic plan/business plan is ratified annually and is understood by all staff who are required to participate.			

What you  
will receive  
within your  
first cut  
analysis  
report.



We will look at your analysis and review where you may have areas that require review or improvement within your organisation.



We will assist you to help you develop a plan of action for areas that require review, improvement and development.



We can supply you with the formats, formulas and templates where required.