

Organizational Assessment Tool (OAT): Overview and Summary of Process

Prepared by: Dionne A. Falconer, OODP Consultant, June 2016

Revised by: Radha Nayar, OODP Director, June, 2026

Introduction

The Organizational Assessment Tool (OAT) assists HIV-funded organizations and programs (hereafter called AIDS Service Organizations, or ASOs) to improve the quality of their programs and services, as well as achieve their mission and organizational goals. The OAT is an evolution of OODP's Organizational Self-Assessment Tool (OSAT). It has been revised to reflect the realities of the operational environment for ASOs today, as well as to align with current best practices in organizational development and performance.

The OAT is a tool that helps ASOs to be more systematic about identifying organizational/program strengths as well as areas for improvement. Using the OAT can **support ASOs to meet accountability requirements and identify priority areas where investments (including human and financial resources) can be made to improve performance**. The OAT is not a tool to resolve operational, financial or human resources (HR) issues.

The OAT is tailored specifically to support **ASOs in Ontario**. It has been developed with the organizational review guidelines developed for **HIV & Hepatitis C Programs (HHP) - Ontario Ministry of Health funded organizations and programs** in mind. The OAT aligns with the values of both the sector and the OODP. It uses an anti-racism lens and supports decolonized ways of working. The Greater Involvement of People Living with HIV/AIDS and the Meaningful Engagement of People Living with HIV/AIDS (GIPA/MEPA) is also centered. These approaches are a must for any organizational assessment tool to be impactful in helping ASOs to meet the needs of Ontario's diverse communities, including those disproportionately impacted by HIV/AIDS.

How the OAT is Structured

The OAT has been organized into **seven (7) modules**. These seven (7) modules reflect the operations and values of non-profits in general and the HIV sector specifically. Each module has indicators of performance to support organizational excellence. They are:

1. Governance
2. Senior Leadership
3. Human Resources (Staff and Volunteers)
4. Operations
5. Programs/Services and Community Engagement
6. Communications
7. Critical AIDS Service Organization (ASO) Frameworks (Anti-Racism & Anti-Oppression, Anti-Black Racism, GIPA/MEPA and PHA Engagement, and Reconciliation with Indigenous Communities)

Each section has two components: **(A) Establishing a Solid Foundation and (B) Striving Towards Excellence.**

Part (A): Establishing a Solid Foundation: This component provides a checklist of key foundational documents, policies and processes that are essential for ASOs to function effectively. At the end of the checklist, there are also reflection questions that help ASOs take a deeper dive into what needs to be strengthened and why. ASOs can also note what OODP might be able to help you with going forward. Typically, the Executive Director (ED) and/or leadership team can complete this component, but others can be invited to participate.

Part (B): Striving Towards Excellence: This component has indicators relevant to each topic area to promote performance that supports organizational excellence. While the indicators included are not a complete list, they reflect key signals of foundational work, effort and progress. ASOs can do it online. Each person participating in the assessment should go through this section on their own initially and then the OODP consultant will facilitate a discussion with the OAT team to identify ways to move forward.

Using the OAT

An OODP consultant will help the ASO to decide on which modules they want to do, and who will be involved in the assessment (the OAT Team) and who will coordinate and guide the process internally for the ASO (the Internal Lead).

Each member of the OAT team will be assigned to fill out either Part (A), Part (B) or both. Once all team members have completed their assigned sections of the chosen modules, report of collated scores (from both components) will be generated. This report forms the basis of the facilitated discussion the OODP consultant has with the OAT team. The results of the assessment are explored, and what actions, if any, ASOs want to take to strengthen organizational performance. The final product is an Organizational Assessment Action Plan, which outlines key actions, who will do them and by when. OODP continues to stay in touch with the ASO to support progress and provide further supports as needed.

Conditions for Success

The following are conditions for success for using the OODP OAT:

1. Ensure that there is leadership commitment to support the assessment process.
2. ASOs should complete the OAT when they are sure participants have the time. They should avoid doing it when other major organizational initiatives are underway.
3. The Internal Lead should be well-organized and ensure all the needed documents are gathered before they start, and that everyone has clear instructions on what to do.
4. Other than the Critical ASO Frameworks module (#7) which OODP recommends ASOs do first, ASOs should focus on modules that are a concern and that they can do thoroughly rather than trying to do everything.

Summary of Process

