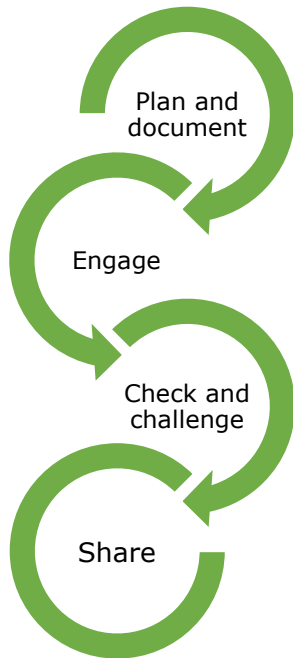


## Good practice in self-evaluation - hints and tips



The main ingredients to make a really good job of self-evaluation:

1 Do the planning well; and  
2 Communicate throughout the process.

Here's my FOUR steps to running a successful self-evaluation exercise and things to think about.

**Plan and document**



**Take action:** think it through, write it down, review it (and again), get feedback; and keep your plan and progress under review throughout.

### Think about:

- What are you trying to achieve?
- Who do you want, or need to involve?
- Factor in who you need to share the findings with, also who are the doubters or influencers that you need to talk through the process and findings with before it reaches the governing body?
- How will you deliver any potential 'bad news'?
- How much time have you got?(and always build in some slack, I usually put in about 5% of overall time available)
- What's important for you to record during the process: How can you make the recording document easy to use and navigate? Designing a good recording document will save you time and effort later.
- Factor in time to document, write up and get some feedback on your draft findings.
- Don't wait until tomorrow to write things down, for sure something will get in the way and it gets lost.



**Think about:**

- Getting colleagues, management and governing body members engaged – maybe they can they help lighten the load, particularly if compliance isn't your only job.
- Owners of some functions who could help to identify relevant evidence; management or GB members might be the right people to lead sessions with teams to talk through and identify compliance evidence.
- Think bigger picture: compliance is an all organisation issue - following relevant policy, making sure the relevant process and checks are followed is important - this applies to HR, the IT team, etc so don't ignore them.
- Let all colleagues and teams know what is happening and talk to them about what and how they can contribute.



**Think about:**

- Does everyone understand the same thing when they look at a particular Condition of Recognition? Seriously, make sure everyone is on the same page.
- Is everything covered as it should be? All the Conditions?
- Are you able to objectively challenge the evidence of compliance – does it really meet the Condition? Objectivity as a minimum is about being independent of the process and its people.
- Is that right? Can you do the mirror (ethical) test and feel comfortable about the evidence for each area, that you are not making any compromises?

**Share**



**Take action:** finalise your report and ask others for any feedback, complete and share your report.

**Think about:**

- Do your findings and report accurately reflect the real position of the AO?
- Is your report and anything else you have provided clear? Will readers be able to pick up on the messages you want them to hear? A well-structured report will help with this.
- Have you got a distribution list – do some people need this report before others, or does someone have to clear the report before it's shared?
- Give yourself some credit and say thank you to everyone who worked with you. Has the work been well executed and the report well received?
- What's next? How are your findings going to change things, do they need to?

**If you found this helpful**

Looking for some support for your self-evaluation, to help take some work off your to-do list and give you the confidence of a professional job? I have experience as a Responsible Officer and have worked with a range of small and large AOs.

Heather also works with Awarding Organisations to support qualification development, organisational development, training, compliance and other projects. If you would like to talk about self-evaluation..

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