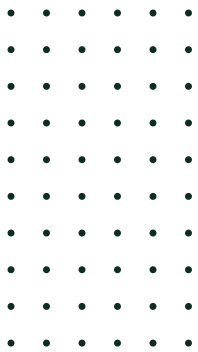
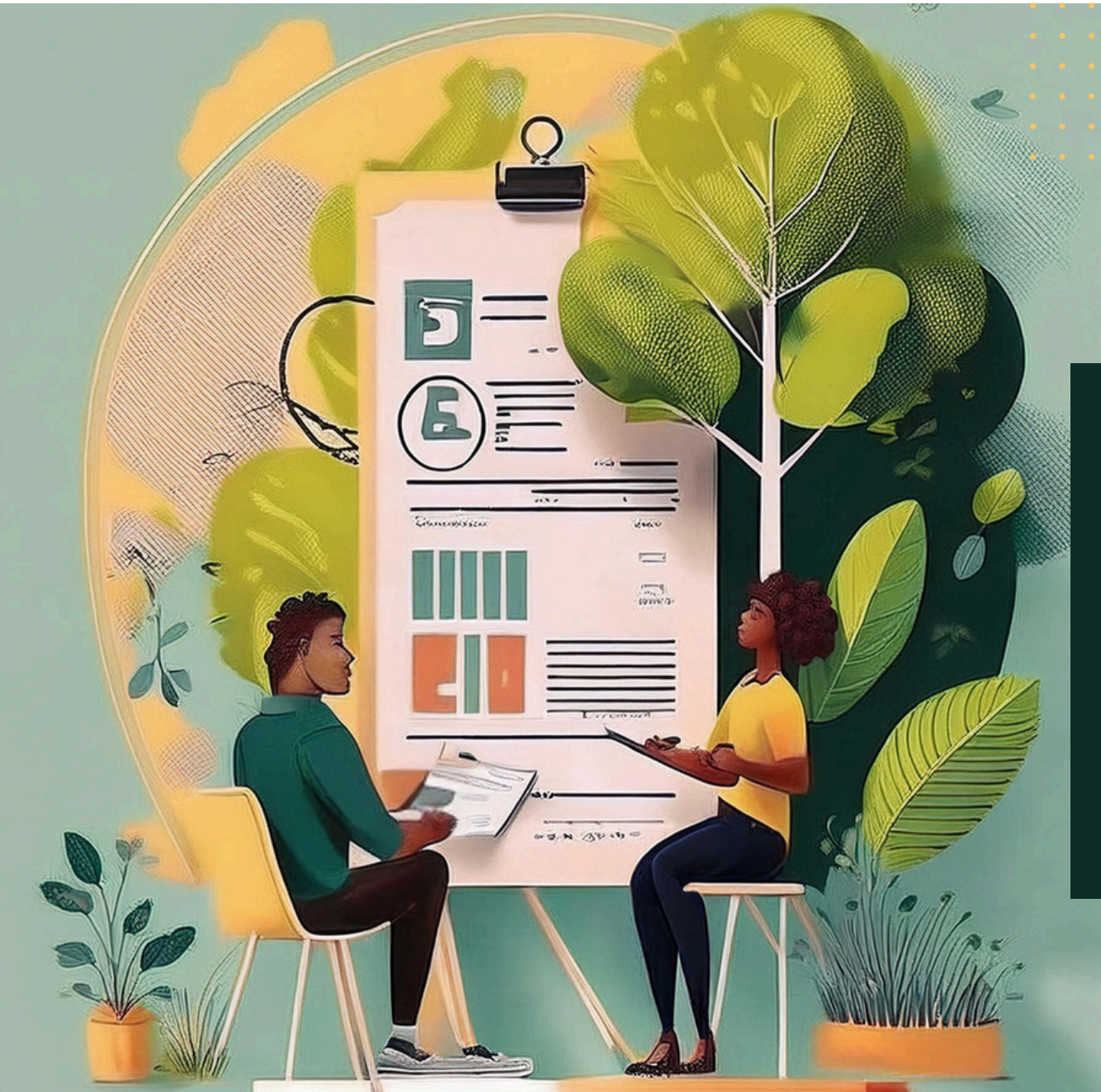
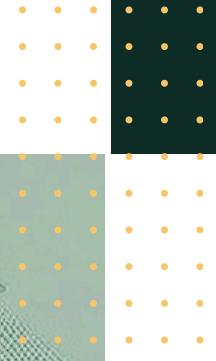




GOVERNMENT
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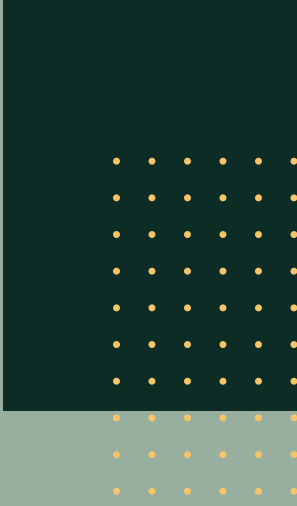


Foundation for Social Welfare Services
Here for you



SELF-ASSESSMENT TOOL

A participatory tool to reflexively assess and develop your organisation's vision, policies, and practices concerning inclusion and sustainability



About

The Social Audit Self-Assessment Tool has been commissioned by the Foundation for Social Welfare Services (FSWS) as part of its commitment to Electoral Manifesto Proposal No. 163.

This tool is designed to support organisations in evaluating and strengthening their inclusivity practices, fostering cross-sector collaboration, and reinforcing the social fabric of local communities. Through self-assessment, organisations can better align with community values, encouraging a more integrated and inclusive environment.

This tool is part of a broader initiative that also includes the development of community-based networks and sensitivity training for non-professionals in community-based organisations.

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Published by

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within the Foundation for Social Welfare Services, Malta

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01. INTRODUCTION

1.1 Aims

In the context of contemporary Malta and with a focus on inclusion and integration, this social-audit tool provides community-oriented (e.g., youth centres, band clubs in localities, day care centres, migrant associations, advocacy groups, associations for professionals, schools, religious organisations, etc.), public, private, and non-governmental organisations with signposts for reflection and development on matters that concern service-provision at community level.

Specifically, the tool is intended to support organisations in:

- **reflecting** on their responsiveness to the needs of diverse communities; and
- **evaluating** if and to what extent they are sustaining and strengthening the principles of access, equity and social inclusion for all, in a participatory, authentic, and accountable manner – with special attention to minors, older adults, migrants, first generation students in post-compulsory education, beneficiaries and applicants for social services, persons with disability, LGBTIQ+, persons with limited digital access or digital literacy, etc.

1.2 Characteristics

Originally developed in English, this tool is built to maximise the quality and comprehensiveness of the reflection undertaken by the respective organisations.

Using a participatory methodology, the tool was developed, piloted, and validated with stakeholders that included representatives of diverse state and non-governmental organisations.

The characteristics of the instrument are in sync with the tool's primary goal, that of providing ample opportunities for participants to engage critically with their respective organisation, in a non-threatening and equitable educational space.

Additionally, the tool is designed to stimulate and support the collaborative development of sustainable action plans, project proposals, fora for discussions, networks, etc. More specifically, the tool is:

- **Participative:** it encourages and enables all persons within the organisation to be involved in the reflective process. The expectation is for the organisation to involve as many persons as possible, from various levels of the organisation (senior to less senior), and to include, where applicable, service users and other stakeholders (i.e., persons, parties, or entities who have an interest in the organisation's work programme and its running; can include such as beneficiaries and the minorities amongst these, internal or external contributors, employees, volunteers, collaborators, etc.);

Characteristics...

- **Self-reflective:** the tool encourages the organisation to question and problematise its own practices, processes, and structures;
- **Flexible:** the expectation is for this tool to be used flexibly, in response to the immediate needs of the organisation. It is possible for the organisation to make partial use of the document and to overlook items which are perceived by the organisation as irrelevant to the organisation's operational reality;
- **Action-oriented:** the tool is a vehicle for transformation. While reflection is key, transformation is incomplete without a plan of action;
- **Educational:** the tool is meant to mediate the transition of the organisation into a learning community, where reflection is perceived as key to the organisations' development and as education in process;
- **Ethical:** equitable representation, dignified participation, respect, transparency, declaration of any conflicts of interest, and use of data and information in line with the established laws and regulations is not negotiable.



1.3 Expectations

While the organisation is free to choose its approach, the following pedagogical principles will help in enhancing the reflective experience:

- **Preparation:** participants are sent a preparatory document in advance, outlining the rationale for the session, clearly indicating the focus of the meeting, and outlining which questions will be discussed;
- **Avoid silos:** organisers are encouraged to create mixed groups, where participants are expected to engage dialogically with each other;
- **Widen participation:** where possible and practical, meetings are to feature service users and other stakeholders;
- **Validate lived experiences:** meetings are expected to affirm participants' lived experiences and insights;
- **Allocate sufficient time:** reflective sessions are to be seen as an integral feature of the organisations' development, and be allocated sufficient time within their ongoing professional development plan;
- **Promote dialogue:** questions are meant to stimulate dialogue rather than take a question-and-answer format.

1.4 Call for Action

The expectation here is for this document to stimulate action informed by the reflection process. The tool is meant primarily to help organisations develop into authentic democratic spaces that serve social justice.

02. THE SELF-ASSESSMENT TOOL

Using a participatory approach and drawing on existing good practices in organisational self-assessment in Malta and overseas, the tool is designed to help organisations engage with six areas. The areas are key to enhancing community-based organisations' responsiveness to the needs of diverse communities with respect to access, equity, and social inclusion for everyone, particularly for persons with minority background, e.g., migrants, persons with disability, LGBTIQ+, persons with limited digital access or digital literacy, etc.

The six areas are introduced below:

A: Engaging Communities and Stakeholders

This section invites and guides reflections on the assets that the organisation's stakeholders and its target communities have in (further) supporting the organisation's mission and operations. This asset-based profiling will contribute to charting tangible resources such as databases, spaces, and intangible resources, such as networks, routines, traditions, and trust relations

B: Leadership, Governance and Management

This section elicits a discussion on existing and prospective leadership, governance, and management dynamics and practices within the organisation. The section will appraise and tease out aspirations concerning democratic and devolved representation.



C: Communication and Public Relations

This section investigates the different channels of communication that the organisation maintains within, and with stakeholders, the public, and social cohorts.

D: Sustainable Development

Here, participants assess the organisation's growth (recent and projected) in relation to the corresponding use of resources (including human resources). This part of the tool supports participants with identifying sustainable development practices that can be integrated in the present or near-future operations of the organisation.

E: Professional Development

This section of the tool is meant to guide the discussion about competences and skills of persons within the organisation. Competences and skills can be actual, potential, or targeted. They can be formal, certified, or non-formal, as informed by the lifelong education and recognition of prior learning. Participants are also expected to identify stakeholders and opportunities to (further) support inclusive professional development, i.e., that also caters for persons with minority or challenged background, e.g., migrants, persons with disability, LGBTIQ+, persons with limited digital access or digital literacy, etc.

F: Reflexive Practice

This section supports participants in their critical reflection which leads to the development of a plan of action.

Every section concludes with an invitation and a guide to develop a Monitoring and Evaluation Plan.

2.1 How to Use the Tool

There is no one way of using this tool. The specific needs of the respective organisation should guide use of the document. While full use of the document is advisable, partial, or staggered use of the document is also in line with the spirit in which the document was formulated.

The tool is a dynamic document. Some of its items may not be applicable to every organisation.

The **Glossary** supports the understanding of key terms, as understood in the context of this tool. The keywords noted at the start of each section reflect the spirit of the section, i.e., they might not necessarily feature in the specific section.

All keywords feature in the Glossary.

A facilitator should be appointed to facilitate the discussion. This role should be filled by a person who is sufficiently knowledgeable about the organisation and its stakeholders, who knows how to speak, read, and write at least the language being used for the self-assessment exercise, and who upholds and practices respect and equity, among other values.

Allocating sufficient time (1 to 2 hours for each section), spreading the exercise over a number of sessions (particularly when the tool is used in its entirety), and note-taking are recommended.

In their reflective process, organisations may also discuss topics or indicators which are not included in this tool.

The authors of this document assume that the respective organisation is committed to ongoing reflection for organisational development.





2.2 Coordination, facilitation, and support services

Depending on the size of the organisation, a committee of persons within the organisation can be tasked with the coordination of this reflexive self-assessment exercise periodically (e.g., once a year); and members of this coordination team can be the same or (partly) changed over time, as is most suitable for the organisation.

The ACTS will support organisations requiring further guidance with the coordination, facilitation, use of this tool, troubleshooting related to the self-assessment exercise, networking with pertinent stakeholders or support services, developing and implementing proceedings or action plans resulting from the self-assessment.

For additional information, please contact issat@gov.mt

2.3 License and Terms of Use

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Please refer to the last page of this booklet for the citation guide.

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03. SELF-ASSESSMENT TOOL



Section A:

Engaging Communities and Stakeholders



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Please insert the relevant section*

Section A: Engaging Communities and Stakeholders

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- discuss assets held by the organisation's stakeholders and target communities;
- chart pools of knowledge and gaps in knowledge that the organisation has of its target community(ies) and stakeholders;
- identify collaborators and synergies that (further) enhance stakeholder and community engagement.

Keywords: asset-based, profiling, synergy.

Note: Should your organisation decide not to use this Section, write a brief note below to explain why
e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering this can take place	This is not being done / There is no plan to do this / This is not applicable to our organisation
	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>Practical examples include... More information is available on the organisation's website (insert link), OR published or unpublished report (insert title, year, link, etc. if needed)</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What has been done to date? What needs to be further developed?</i></p>	<p>If this answer best reflects the current situation, include hereunder brief notes on the related evidence. Useful prompts can include: <i>How is the plan secured? (e.g., strategy, minutes, working group). What are the timeframes envisaged? Any risks and mitigating measures in place?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes that explain: <i>What are the reasons? Who will be involved? What are the timeframes envisaged?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What are the reasons? (e.g., We do not know of any entities that we can collaborate with or can support us with this / This is not relevant to the objectives / mission / work programme of our organisation because...</i></p>
<p>1. The sources of information the organisation uses in its operations are updated. <i>(Explainer: Sources of information used by different organisations can vary. Examples can include personal records of users of services, published statistics, reports, case studies, etc.)</i></p>					

<p>2. The sources of information the organisation uses include socio-demographic information (<i>e.g., gender, age, civil status, place of residence, etc.</i>).</p>					
<p>3. The sources of information the organisation uses includes information provided directly by its stakeholders.</p>					
<p>4. The sources of information the organisation uses include insightful personal testimonials or small-scale daily episodes provided by beneficiaries of the services that the organisation provides.</p>					

5. Relevant data about the social groups targeted by the organisation inform the organisation's policies, planning, activities, projects etc.

6. The organisation has a roadmap or an action plan of engagement with its target community(ies) or stakeholders.

7. The organisation uses a range of **methods** (*these can include data collection, workshops, etc.*) to engage stakeholders – **with attention to diverse backgrounds and abilities.**

<p>8. The organisation uses a range of resources to engage its target community(ies) or stakeholders – with attention to diverse backgrounds and abilities (<i>e.g., provision of content in the required languages, translators, cultural mediators, access support for persons with disability, platforms, imagery that is representative of social diversity, ICT, media, networks, Malta/EU funds, etc.</i>).</p>					
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<p>9. Standard procedures are in place to monitor who uses the services that the organisation provides to ensure services stay relevant and cater for diversity.</p>					
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<p>10. Consultation with target community(ies) and stakeholders of the organisation informs development / optimisation / review of policies, action plans, activities, etc.</p>					
<p>11. The organisation has procedures in place or in plan for dealing with complaints.</p>					
<p>12. The organisation is knowledgeable of or networked to contacts that can support it with (further) developing a participatory and asset-based approach towards engaging its target community(ies) or stakeholders (state, EU, other contacts).</p>					

<p>13. Other aspects that you feel should be mentioned here to record that the organisation engages its target community(ies) or stakeholder. Engagement includes...</p>					
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14. Way forward, notes, questions, and comments:
Use this space to record any further information related to this section.

15. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

Further support to develop this or for additional information, please contact issat@gov.mt

Issue / objective	Action point(s) and timeframes envisaged	Person(s) responsible for each action point	For each action point: Resource(s) needed from within the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	For each action point: Resource(/s) needed from outside the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	Other comments

END OF SECTION

03. SELF-ASSESSMENT TOOL



Section B:

Leadership, Governance and Management



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Please insert the relevant section*

Section B: Leadership, Governance and Management

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- list quality leadership, governance and management practices that characterise the organisation;
- review the structure / organisational chart (organigram) of the organisation with attention to existing and prospective leadership, governance, and management dynamics; and
- identify opportunities for a broader and more devolved representation within the leadership, governance, and management structures of the organisation.

Keywords: collusion, conflict of interest, devolution, meritocracy, organigram, standard operating procedure (SOP).

Note: Should your organisation decide not to use this Section, write a brief note below to explain why
e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering it	This is not being done / There is no plan to do this / This is not applicable to our organisation
	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>Practical examples include... More information is available on the organisation's website (insert link), OR published or unpublished report (insert title, year, link, etc. if needed)</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What has been done to date? What needs to be further developed?</i></p>	<p>If this answer best reflects the current situation, include hereunder brief notes on the related evidence. Useful prompts can include: <i>How is the plan secured? (e.g., strategy, minutes, working group). What are the timeframes envisaged? Any risks and mitigating measures in place?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes that explain: <i>What are the reasons? Who will be involved? What are the timeframes envisaged?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What are the reasons? (e.g., We do not know of any entities that we can collaborate with or can support us with this / This is not relevant to the objectives / mission / work programme of our organisation because...</i></p>
<p>1. Inclusion and integration are words that feature in the organisation's mission, policies, role descriptions, etc.</p>					

2. The organisational chart (organigram) of the organisation is documented.

3. Descriptions, duties, and rights pertinent to all roles in the organisation are documented.

4. Persons who join this organisation are induced into the organisational culture (values, standards, practices, etc.)

<p>5. The organisation has standard operating procedures in place.</p>					
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<p>6. The organisation internally reviews its organigram (organisational chart), related roles, and standard operating procedures.</p>					
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<p>7. The organisation has more than one decision-making person, e.g., a group or committee of people making decisions.</p>					
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<p>8. The organisation's decision-making structure(s) include(s) representatives of its target community(ies) or stakeholders.</p>					
<p>9. The organisation's decision-making processes include spaces and opportunities for genuine dialogue, to interact, discuss, debate, etc.</p>					
<p>10. Decision-makers are meritocratically appointed or democratically elected, following criteria or standard operating procedures.</p>					

<p>11. The organisation has an appeal system in place that is accessible to all persons within the organisation wishing to appeal a decision or challenge something that is taking or has taken place.</p>					
<p>12. The organisation provides persons working within it with information and support to reduce the risks of conflicts of interest, or other threats to transparency and governance, e.g., forms to declare a conflict of interest (example of conflict of interest form) and guidance on when these need to be submitted.</p>					
<p>13. The organisation has working groups or task forces where new ideas and procedures can be developed and then proposed to the management / leadership.</p>					

<p>14. The organisation's leadership, governance or management system have undergone an external audit.</p>					
--	--	--	--	--	--

<p>15. The organisation is knowledgeable of, or networked to contacts that can support it with (further) enhancing its leadership, governance, and management (State, EU, other contacts).</p>					
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<p>16. Other aspect/s that you feel should be mentioned here to record the organisation's engagement with leadership, governance, and management include...</p>					
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17. Way forward, notes, questions, and comments:

Use this space to record any further information related to this section.

18. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

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Issue / objective	Action point(s) and timeframes envisaged	Person(s) responsible for each action point	For each action point: Resource(s) needed from within the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	For each action point: Resource(/s) needed from outside the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	Other comments

END OF SECTION

03. SELF-ASSESSMENT TOOL



Section C:

Communication and Public Relations



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Please insert the relevant section*

Section C: Communication and Public Relations

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- list communication and public relations methods and practices that enable engaging exchanges and dialogue with the organisation's target community(ies) and stakeholders;
- discuss how to effectively resource diverse communication platforms and channels, including social media; and
- identify ways how the organisation (can) foster(s) media and political literacy.

Keywords: branding, cultural diplomacy, General Data Protection Regulation (GDPR), mainstream and non-mainstream, media literacy, political literacy.

Note: Should your organisation decide not to use this Section, write a brief note below to explain why *e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)*

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering it	This is not being done / There is no plan to do this / This is not applicable to our organisation
	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>Practical examples include... More information is available on the organisation's website (insert link), OR published or unpublished report (insert title, year, link, etc. if needed)</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What has been done to date? What needs to be further developed?</i></p>	<p>If this answer best reflects the current situation, include hereunder brief notes on the related evidence. Useful prompts can include: <i>How is the plan secured? (e.g., strategy, minutes, working group). What are the timeframes envisaged? Any risks and mitigating measures in place?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes that explain: <i>What are the reasons? Who will be involved? What are the timeframes envisaged?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What are the reasons? (e.g., We do not know of any entities that we can collaborate with or can support us with this / This is not relevant to the objectives / mission / work programme of our organisation because...</i></p>
<p>1. The organisation checks that what and how it communicates are congruent to what it stands for, and in the interest of its target community(ies).</p>					

<p>2. The organisation has an incoming and/or outgoing communications protocol / standard operating procedure in place.</p>					
<p>3. The organisation invests time and resources in fact-checking or in voicing multiple sources, including non-mainstream voices.</p>					
<p>4. The organisation has safeguards against receiving, and/or endorsing, and/or onboarding, deceptive / misleading / unethical content (e.g., hate speech).</p>					

<p>5. The organisation has safeguards against communicating deceptive / misleading / unethical content (e.g., hate speech)</p>					
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<p>6. Organisation members who need to know GDPR to fulfil their role are knowledgeable about it and/or have received training about this.</p>					
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<p>7. The organisation has the safeguards to communicate in a GDPR-compliant way.</p>					
--	--	--	--	--	--

<p>8. The organisation carries out an analysis of its current or potential audience(s).</p>					
--	--	--	--	--	--

<p>9. The organisation has safeguards to communicate, reach out, or deliver services in an accessible and inclusive manner, e.g., to effectively reach the less digitally or alphabetically literate, less networked persons, etc.</p>					
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<p>10. The organisation's communications / outreach / branding strategy is documented.</p>					
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<p>11. The organisation has a standard follow-up procedure in place, to ensure that whoever reaches out to the organisation is replied to in an ethical, timely and efficient manner.</p>					
--	--	--	--	--	--

<p>12. The organisation's roles include at least one qualified or skilled communications or public relations officer.</p>					
--	--	--	--	--	--

<p>13. The organisation has enough competent human resources to cater for all incoming and/or outgoing communication needs.</p>					
--	--	--	--	--	--

<p>14. The organisation uses research or data to inform its communications and public relations (<i>e.g., focus groups, surveys, piloting, usage of social media by followers, etc.</i>)</p>					
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<p>15. The organisation is knowledgeable of, or networked to contacts / opportunities that can support it with (further) enhancing its communications / public relations (state, EU, other contacts).</p>					
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<p>16. Other aspect/s that you feel should be mentioned here to record the organisation's engagement with communications and public relations.</p>					
---	--	--	--	--	--

17. Way forward, notes, questions, and comments:

Use this space to record any further information related to this section.

18. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

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Issue / objective	Action point(s) and timeframes envisaged	Person(s) responsible for each action point	For each action point: Resource(s) needed from within the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	For each action point: Resource(/s) needed from outside the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	Other comments

END OF SECTION

03. SELF-ASSESSMENT TOOL



Section D:

Sustainable Development



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Please insert the relevant section*

Section D: Sustainable Development

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- relate the organisation's growth (recent and projected near future) to the corresponding use of resources (including human resources);
- discuss the organisation's engagement with sustainable development; and
- identify sustainable development practices that can be integrated in the ongoing or near future operations of the organisation.

Keywords: binary and non-binary, equality, equity, inclusion, integration, work-life balance.

Note: Should your organisation decide not to use this Section, write a brief note below to explain why
e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering it	This is not being done / There is no plan to do this / This is not applicable to our organisation
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<p>1. The organisation's roadmap / action plan / work programme etc. are informed by impact assessments (<i>e.g., social impact assessment, environmental impact assessment</i>).</p>					

<p>2. The organisation’s mission addresses one or more of the United Nations (UN) 17 Sustainable Development Goals^[1] and/or Malta's Sustainable Development Strategy for 2050 and/or a pertinent national strategy (kindly specify).</p>					
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<p>3. The organisation is partner with Malta- or EU-based entities that advocate for one or more of the UN’s 17 Sustainable Development Goals.</p>					
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[1] [UN’s 17 Sustainable Development Goals](#)

- | | | |
|--|---|---|
| <p>1. <i>No Poverty</i>
 4. <i>Quality Education</i>
 7. <i>Affordable & Clean Energy</i>
 10. <i>Reduced Inequalities</i>
 13. <i>Climate Action</i>
 16. <i>Peace, Justice & Strong Institutions</i></p> | <p>2. <i>Zero Hunger</i>
 5. <i>Gender Equality</i>
 8. <i>Decent Work & Economic Growth</i>
 11. <i>Sustainable Cities & Communities</i>
 14. <i>Life Below Water</i>
 17. <i>Partnerships for the Goals</i></p> | <p>3. <i>Good Health & Wellbeing</i>
 6. <i>Clean Water & Sanitation</i>
 9. <i>Industry, Innovation & Infrastructure</i>
 12. <i>Responsible Consumption & Production</i>
 15. <i>Life on Land</i></p> |
|--|---|---|

<p>4. The organisation has a strategy or roadmap in place on how to integrate all / some of the UN's 17 Sustainable Development Goals in its mission and operations.</p>					
<p>5. Financial or non-financial investment that the organisation has recently made, or will be making (<i>e.g., in the next 12-24 months</i>), testifies to its commitment towards one or more of UN's 17 Sustainable Development Goals.</p>					
<p>6. In the organisation there is at least one officer whose responsibilities include directing and overseeing the organisation's increasingly sustainable use of resources, including human resources.</p>					

<p>7. The organisation is showing adaptive and/or proactive capacity to more / less expected change (<i>social change, economic change, environmental, etc., e.g., COVID-19, climate change, multiculturalism, population changes, etc.</i>).</p>					
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<p>8. The organisation is deploying or sharing with other entities adaptive and/or proactive measures to include cohorts associated with discrimination, inequalities, social exclusion [<i>e.g., family-friendly measures and facilities, using premises that facilitates the participation of persons with disability or have limited means; producing and disseminating content that is representative on diversity (gender diversity, neurodiversity, etc.)</i>].</p>					
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<p>9. Any salaried work within the organisation is regulated by employment contracts.</p>					
<p>10. The organisation supports the maintenance of a work-life balance of its officers (<i>e.g., through family-friendly measures, health & wellbeing measures, etc.</i>).</p>					
<p>11. The organisation has a policy / part of the statute, external recognition, or practices in place that mainstream(s) equality, diversity, inclusion, accessibility, etc. (<i>gender, sexual identity, sexual orientation, age, ethnic background, etc.</i>) – for example a Gender Equality Plan, Equality Mark certificate, awarded by the National Commission for the Promotion of Equality (NCPE).</p>					

<p>12. When sourcing a professional service, the organisation considers those listed in the NCPE's Directory of Professional Women, or adopts a comparable equality-seeking sourcing methodology.</p>					
<p>13. The organisation fosters active ageing internally, or through its operations.</p>					
<p>14. In the organisation there is at least one officer whose responsibilities include research-related tasks.</p>					

15. The organisation's infrastructure is accessible to all those who participate in the organisation's activities, irrespective of socio-demographic or ability differences (*e.g., bathroom for persons who do not identify as men or women, auditory and Braille signage for the visually challenged, etc.*).

16. The organisation is knowledgeable of, or networked to contacts that can support it with (further) enhancing its sustainable development (state, EU, other contacts).

<p>17. Other aspect/s that you feel should be mentioned here to record the organisation's engagement with sustainable development.</p>					
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18. Way forward, notes, questions, and comments:
Use this space to record any further information related to this section.

19. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

Further support to develop this or for additional information, please contact issat@gov.mt

Issue / objective	Action point(s) and timeframes envisaged	Person(s) responsible for each action point	For each action point: Resource(s) needed from within the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	For each action point: Resource(/s) needed from outside the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	Other comments

END OF SECTION

03. SELF-ASSESSMENT TOOL



Section E:

Professional Development



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Please insert the relevant section*

Section E: Professional Development

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- list practices that foster inclusive human resource professional development;
- analyse existing or potential competencies and skills using the lifelong education and recognition of prior / non-formal learning perspectives; and
- identify stakeholders that can (further) support inclusive professional development.

Keywords: affirmative action, continuous professional development (CPD), mentoring, micro-credentials, performance appraisal, quotas, recognition of prior learning, rubric, shadowing, transferable skills.

Note: Should your organisation decide not to use this Section, write a brief note below to explain why *e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)*

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering it	This is not being done / There is no plan to do this / This is not applicable to our organisation
	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>Practical examples include...</i></p> <p><i>More information is available on the organisation's website (insert link), OR published or unpublished report (insert title, year, link, etc. if needed)</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence.</p> <p>Useful prompts can include: <i>What has been done to date? What needs to be further developed?</i></p>	<p>If this answer best reflects the current situation, include hereunder brief notes on the related evidence.</p> <p>Useful prompts can include: <i>How is the plan secured? (e.g., strategy, minutes, working group). What are the timeframes envisaged? Any risks and mitigating measures in place?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes that explain:</p> <p><i>What are the reasons? Who will be involved? What are the timeframes envisaged?</i></p>	<p>If this answer best reflects your organisation's current position / situation on this, include hereunder brief notes on the related evidence. Useful prompts can include: <i>What are the reasons? (e.g., We do not know of any entities that we can collaborate with or can support us with this / This is not relevant to the objectives / mission / work programme of our organisation because...</i></p>
<p>1. Roles within the organisation foster professional growth / development. <i>(e.g., acquisition of new knowledge and (transferable) skills, platform career advancement within the organisation or beyond, mental and emotional wellbeing, etc.).</i></p>					

<p>2. Role descriptions reflect inclusion and integration objectives, and are reviewed for quality-assurance purposes.</p>					
<p>3. Professional development goals of officers of the organisation are integrated into the organisation's strategy / work programme.</p>					
<p>4. Among the designated roles of the organisation there is at least one with expertise in human resource development/ career guidance.</p>					

<p>5. The organisation has an open access or accessible manual that regulates recruitment, remuneration, promotions, professional growth, development, etc.</p>					
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<p>6. Recruitment and promotion criteria are based on merit that is quantified or qualified with a rubric used by decision-makers.</p>					
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<p>7. The organisation's recruitment and promotion procedures endorse recognition of micro-credentials, non-formal or prior learning.</p>					
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<p>8. The organisation celebrates its human resources <i>(e.g., newsletter or social media posts to announce new recruits, promotions, achievements attained from outside the organisation, etc.).</i></p>					
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<p>9. The organisation celebrates the diversity among its human resources and stakeholders <i>(e.g., gives positive visibility to persons with disability, LGBTIQ+, parents, foreigners, etc. on newsletter or social media posts etc.).</i></p>					
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<p>10. The organisation has policies or mechanisms in place or under development to ensure no officer is excluded from professional development.</p> <p><i>(e.g., gender+ equity/equality plan, affirmative actions, such as quotas against glass ceiling, collection of diversity data of applicants, recruits, promoted, external interviewers / members of recruitment boards, appeals system, audits, quality assurance, etc.)</i></p>					
<p>11. The organisation invests time and resources in the professional development of its officers.</p> <p><i>(e.g., induction, mentoring, buddying, shadowing, appraisals, micro-credentials, sponsoring training, etc.)</i></p>					

<p>12. A performance appraisal is carried out with all officers within the organisation.</p>					
<p>13. All officers within the organisation have a personalised professional development plan, which they co-authored, and which they co-review.</p>					
<p>14. The organisation actively encourages the continuous professional development (CPD) / lifelong education of all its officers. <i>(e.g., provision of special leave, reduced hours, endorsements, secondments, sponsoring training, etc.)</i></p>					

<p>15. The organisation is well-informed about professional development opportunities. <i>(e.g., subscribed to newsletters of professional associations / pertinent entities that provide CPD)</i></p>					
<p>16. The organisation hosts internship / coaching / mentoring / shadowing programmes.</p>					
<p>17. In-house training, professional development and career advancement opportunities are accessible to all officers.</p>					
<p>18. The organisation is knowledgeable of, or networked to contacts that can support it with (further) enhancing its engagement with professional development along the prompts discussed in this section (state, EU, other contacts).</p>					

19. Other aspect/s that you feel should be mentioned here to record the organisation's engagement with professional development.

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20. Way forward, notes, questions, and comments:

Use this space to record any further information related to this section.

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21. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

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END OF SECTION

03. SELF-ASSESSMENT TOOL



Section F: Reflexive Practice



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Please insert the relevant section*

Section F: Reflexive Practice

Targeted Outcomes

Engagement with this section will allow us, as representatives of the organisation, to:

- identify spaces and periods of time that the organisation can use to practice or further develop lessons learnt; and
- develop a Monitoring and Evaluation Plan.

Keywords: impact assessment (environmental or social), monitoring and evaluation, peer-to-peer, quality assurance.

Note: Should your organisation decide not to use this Section, write a brief note below to explain why
e.g., We plan to engage with this Section in a future self-assessment session, specifically, in 6-months' time, in 12-months' time, etc. / We have engaged with this section during the last self-assessment session, specifically (insert date) / This section is not relevant to the objectives / mission / work programme of our organisation because... (specify at least one reason)

Prompts	This is done regularly <i>e.g., periodically, every 1 or 2 months, quarterly, yearly, ongoing etc.</i>	This is being done, but it can improve, or developed further	This is not being done yet, but it's in plan	Now that we are carrying out this self-assessment exercise, we are considering it	This is not being done / There is no plan to do this / This is not applicable to our organisation
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<p>1. The organisation has a quality assurance policy or procedure(s) in place.</p>					

<p>2. The organisation uses monitoring and evaluation plan(s). <i>(e.g., to monitor progress with implementing its strategies, action plans, etc.)</i></p>					
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<p>3. The organisation's calendar of events includes opportunities to reflect deeply and authentically on the organisation's performance and development. <i>(e.g., self-assessment exercises, development day, team day, etc.)</i></p>					
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4. The organisation's calendar of events includes opportunities to reflect deeply and authentically on the organisation's day-to-day life, community dynamics, time and space to safely question / challenge / dialogue / discuss / debate critically and constructively, to trust, etc. (e.g., *self-assessment exercises, development day, team day, informal spaces and opportunities, etc.*)

5. The organisation requests feedback from target community(ies) and its stakeholders. (e.g., *impact assessment, surveys, or other feedback collection exercises*)

<p>6. The organisation seriously considers feedback and evaluation data. <i>(e.g., it factors these into policymaking, strategy, work programme, etc.)</i></p>					
<p>7. The organisation has participated or participates in peer-to-peer evaluation / reviews etc. <i>(e.g., with a comparable organisation, or within a forum / platform / umbrella association, etc.).</i></p>					
<p>8. The organisation is knowledgeable of, or networked to contacts that can support it with (further) enhancing its reflexive practice (state, EU, other contacts).</p>					

<p>9. Other aspect/s that you feel should be mentioned here to record the organisation's engagement with reflexive practice.</p>					
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<p>10. Way forward, notes, questions, and comments: <i>Use this space to record any further information related to this section.</i></p>

11. Monitoring and Evaluation:

The monitoring framework template below can be adapted as needed to record issue(s) or objective(s) identified, action point(s), estimated timeframes, person(s) responsible, resources needed from within / outside of the organisation, persons / entities to contact within / outside of the organisation, etc.

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Issue / objective	Action point(s) and timeframes envisaged	Person(s) responsible for each action point	For each action point: Resource(s) needed from within the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	For each action point: Resource(/s) needed from outside the organisation <i>(if applicable, including contacts or human resources, spaces, facilities, equipment, etc.)</i>	Other comments

END OF SECTION

04. GLOSSARY

Affirmative action

A policy or a measure that seeks to counterbalance a disadvantage or a shortcoming, e.g., the gender corrective mechanism instated in the Maltese electoral system to foster the representation of the under-represented gender(s) in the national parliament.

Asset-based

That which is informed or driven by the strengths of a situation, an individual or a community, e.g., an asset-based approach to community development or to fighting vandalism in community spaces.

Binary (non-binary)

Having two set parts, or the assumption of this, e.g., understanding gender as binary means that there are only two genders, male and female. Non-binary is when this established two-part model is discredited, e.g., a person who is non-binary does not identify with being a man or a woman.

Branding

Promoting or communicating a particular service or an organisation by making it distinguishable and identifiable, e.g., using a specific colour scheme or music genre when advertising or engaging in other public relations.

Collusion

An illicit agreement or collaboration that gets in the way of fair competition, e.g., when two people work together to submit a proposal that had to be developed through individual effort.

Community-oriented organisation

An organisation whose mission includes addressing the needs and well-being of the community it serves. It focuses on engaging with, empowering or emancipating community members through programmes, services, and initiatives. The goal is to foster sustainable social change, progress, and quality of life. Examples: youth centres, band clubs, migrant associations, advocacy groups, day care centres, associations of professionals, enthusiasts' clubs, etc.

Conflict of interest

When a person's assessment or decision is (at risk of being) biased by an interest that is not a criterion for the specific assessment or decision-making situation, e.g., being a member of a selection board, interviewing job candidates who include a family member.

Continuous professional development (CPD)

Participation in educational initiatives to acquire or refresh knowledge and skills that are pertinent to a profession or line of work, e.g., training on how to use online video conferencing for work purposes when COVID-19 social distancing measures were in place.

Cultural diplomacy

When the exchange of ideas, information, art, language, and other aspects of is done to foster understanding, collaboration, and peace, e.g., twinning between two local governance entities located in different regions or countries.

Devolution

The delegation of power to a lower level of the hierarchy, e.g., what motivated the establishment of Local Councils in Malta.

**Dialogue: authentic dialogue versus pseudo-dialogue**

Authentic dialogue is when the parts are genuinely committed to listen, explore, and consider each other's' viewpoints, and respond accordingly, by onboarding, challenging, or negotiating terms (as the case may be) whilst upholding mutual respect, understanding, and critical reflection. In contrast, pseudo-dialogue involves superficial interactions, power imbalances, fake or deceptive consensus or feedback, and/or the suppression of dissenting voices, hindering genuine communication and transformative change.

Equality

When resources and opportunities (e.g., rights, liberties, education, land) are shared and enjoyed without allowing any differences between persons or social groups unbalance the share or access to these, e.g., in the Maltese electoral system all persons of age 16 years and over can vote – irrespective of gender, level of education, income, etc.

Equity

When access and the share of resources or opportunities is designed and administer to counterbalance an existing disadvantage or imbalance, e.g., the provision of a learning support educator.

General Data Protection Regulations (GDPR)

A set of rules designed to protect the personal data of individuals within the European Union (EU), to regulate how organisations collect, process, and store personal data, aiming to give individuals greater control over their information. Non-compliance can result in significant fines.

Impact assessment (environmental or social)

An evaluation of how spaces, contexts, lifestyles, individuals, or groups will be affected by a novelty or a change that is informed by research, evidence and competent interpretation of the research or empirical findings, e.g., an environmental impact assessment (EIA) of land reclamation, a social impact assessment (SIA) of urban development or a new family-friendly policy.

Inclusion

Using laws, policies, strategies, practices, etc. to foster the participation of persons or groups (often minorities, e.g., migrants, persons with disability, LGBTIQ+, persons with limited digital access or digital literacy, etc.) who have traits or characteristics that distinguish them from the rest or put them at a disadvantage in a specific context, e.g., the inclusion of students with specific disabilities in the mainstream classroom.

Integration

Using laws, policies, strategies, practices, etc. to foster connections and conviviality in a context that features marked differences between persons or groups, e.g., opening a multi-faith space accessible to persons of different religious creeds.

Mainstream (mainstreaming, and non-mainstream)

Ideas, attitudes, groupings, areas of knowledge, activities, etc. that are shared by most and are regarded as conventional in a specific context, e.g., the religious creed to which the majority of a population associates with during a particular historical period.

Mainstreaming is the act of normalising an idea, attitude, area of knowledge or activity, e.g., mainstreaming equality, inclusion and diversity in organisational action plans or strategies.

Non-mainstream is when an idea, attitude, area of knowledge, activity, etc. is regarded as unconventional or unpopular, e.g., screening non-English language films in Malta.

**Media literacy**

The ability to decode interests, biases, goals, etc. that motivate media content, e.g., why a specific newspaper publishes specific photos of specific public figures at a specific time; extensive coverage by state-owned media of incumbent government daily engagements.

Mentoring

Guiding individuals who have less experience with advice, feedback, role-modelling, etc., e.g., when a newly qualified educator or social worker receives guidance and works closely with a more experienced, seasoned person in the same profession.

Meritocracy

A system that rewards on the basis of proven competency, e.g., an organisation attains funds for a project because it submitted the proposal that best addressed pertinent assessment criteria that all competitors knew and accepted at the time of submission.

Micro-credentials

Short-term educational initiatives with certified learning outcomes, e.g., stand-alone study-units regularly offered by the University of Malta pegged to ECTS—certification.

Monitoring and Evaluation

A plan or practices that make possible checking and verifying that an outcome is being accomplished, and to what extent, e.g., the monitoring and evaluation plan of a strategy.

Organisational chart / Organigram (or organogram)

A visual representation of the structure of an organisation, e.g., an organisational chart.

Performance appraisal

An evaluation of a person's performance within the organisation, carried out with the person concerned, using criteria considered to be important to fulfil the person's specific role, and to accomplish the organisation's goals. Strengths, weaknesses, and areas for improvement to guide the professional and personal development of the person are identified and discussed.

Political literacy

The ability to read and understand interests, agendas, and processes at play when in a given situation where power acquisition and retention are at stake, e.g., donations by special interest group to finance a political party's electoral campaign.

Quotas

The requirement to have a fixed minimum or maximum number of a particular group for a specific purpose, or in a specific context, e.g., when political parties establish or are required to have a specific number or percentage of candidates from a specific social group (such as women) on the ballot sheet.

Recognition of prior learning (RPL)

When an institution or an authority validates evidence of learning outcomes acquired by an individual through life experiences, knowledge or skills that might not necessarily be certified as understood in the conventional manner, e.g., eligibility to enrol in some courses offered by the University of Malta can be determined on the basis of a portfolio that showcases evidence of pertinent experiences, or acquisition of pertinent knowledge or skills.

Rubric

A set of criteria for assessment, e.g., an exam marking scheme.

**Shadowing**

Closely observing another person with the purpose of acquiring knowledge, e.g., a student-teacher shadowing a fully qualified or seasoned teacher.

Standard operating procedure (SOP)

Step-by-step instructions laid down by an organisation to guide persons working within it with carrying out an operation, e.g., SOP to publish content on the organisation's social media channels.

Peer-to-peer

When a procedure or an interaction involves an exchange between persons who are by and large at the same level in terms of expertise, stage, or competence, e.g., managers of an organisation giving peer-to-peer feedback to one another about management styles during a team-building or continuous professional development activity.

Profiling

A snapshot of the key trends or features of interest of a community or a specific social group, e.g., profiling target cohorts of a Strategy or a media campaign, profiling beneficiaries of a specific social benefit, etc

Quality assurance

Practices designed and implemented to evaluate the achievement of objectives at the required standards. The evaluator (assessor or auditor) could be internally or externally procured, e.g., quality assuring a training initiative or the provision of a medical treatment.

Stakeholders (of an organisation)

Persons, parties, or entities who have an interest in the organisation's work programme and its running. These can include such as beneficiaries, internal or external contributors, employees, volunteers, collaborators, etc.

Sustainable Development

A development approach that meets the needs of the present without compromising the ability of future generations to meet their own needs. It balances economic, social, and environmental considerations to ensure long-term viability.

Sustainable Development Goals (SDGs)

A set of 17 global goals established by the United Nations in 2015, aimed at addressing various social, economic, and environmental challenges worldwide by 2030. Specifically: No poverty, Zero Hunger, Good Health and Wellbeing; Quality Education; Gender Equality; Clean Water & Sanitation; Affordable and Clean Energy; Decent Work and Economic Growth; Industry, Innovation and Infrastructure; Reduced Inequalities; Sustainable Cities and Communities; Responsible Consumption and Production, Climate Action, Life Below Water; Life on Land; Peace, Justice and Strong Institutions; and Partnerships for the Goals. More information is available here: <https://sdgs.un.org/goals>

Synergy

A collaboration or pooling of resources that yields outcomes that are greater or more effective than the sum of the parts, e.g., synergies between formal and non-formal educators, a public partnership that yields a synergy.

Transferable skills

An ability, competency or expertise that can be used, with profit, in a variety of roles or occupations, e.g., stamina, effective communication, problem-solving, self-control.

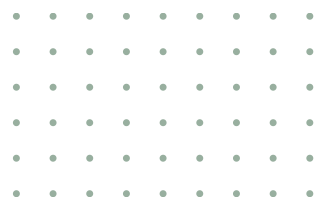
Work-life balance

A state in which work and private life requirements, routines, expectations, trajectories, etc. do not jeopardise one another. Laws, policies, strategies, practices, etc. can be designed and implemented to this end, e.g., family-friendly working hours, the right to disconnect.

05. CITATION GUIDE

When disseminating or citing this work kindly attribute / reference it as follows:

Brown, M., & Borg, C. (2024). *Self-assessment tool: A participatory tool to reflexively assess and develop your organisation's vision, policies, and practices concerning inclusion and sustainability*. Malta: Foundation for Social Welfare Services. Licensed under CC BY-NC-ND 4.0. International deed.



Final Note

Thank you for using this tool. We hope it serves as a valuable resource in supporting your organisation evaluate and strengthen its practices, fostering a more sustainable and inclusive environment.

For any questions, further guidance, or support in using this tool, please contact the Agency for Community and Therapeutic Services at:

Email: issat@gov.mt

Website: www.fsws.gov.mt

A SOCIAL AUDIT SELF-ASSESSMENT TOOL



Foundation for Social Welfare Services
Here for you

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