GE-AH-1.0 / VERSION 1.0

Assessment Handbook

Organizational performance and service quality

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Assessment and certification standards.

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Use this document with its stated edition. Applications and enquiries: contact@greatentity.com. Certificate verification: verify@greatentity.com. Certification follows an assessment and an authorized decision.

Assessment Process

A defined sequence from scope agreement to independent decision.

1. Application and eligibility

Submit your organization, sector, programs, activities, and locations through the assessment portal. You receive an application reference beginning GEA. We review operating history, the proposed scope, and the availability of evidence before offering an engagement.

2. Scope and engagement

Agree the activities, locations, exclusions, applicable modules, evidence period, fee, timetable, confidentiality arrangements, and retention period. The applicant confirms the scope in the portal. Administration appoints a competent assessor and a separate independent reviewer. The non-refundable USD 800 initial payment is required before the assessment process starts.

3. Evidence and assessment

Upload relevant evidence against the 20 criteria. The assessor examines records, samples implementation, interviews relevant people, and evaluates beneficiary feedback. Each rating must identify the evidence examined and explain how it supports the rating. Contradictory evidence and sampling limits are recorded.

4. Findings and response

The report distinguishes strengths, improvement priorities, and nonconformities. Findings identify the criterion, evidence, impact, classification, and required response. Critical and major findings need verified closure before certification; minor findings need an agreed action plan.

5. Independent review and decision

The reviewer examines evidence sufficiency, ratings, score calculations, applicable modules, conflicts, and finding closure. The outcome is approve, defer for further work, or decline, with reasons. The portal preserves the submitted assessment and the decision history.

6. Certificate and continuing review

After a successful assessment and independent approval, pay the remaining USD 2,200. Once payment is confirmed, Great Entity issues the certificate number, downloadable certificate, and register entry. Annual surveillance and renewal follow the published scheme requirements.

Assessment Expertise

Competence, calibration, and independence requirements.

Appointment by competence

Assessors must demonstrate relevant sector experience, an understanding of GEEF and GEES, evidence evaluation, interviewing, sampling, and defensible scoring. A CV alone is not sufficient: appointment requires a calibration exercise and an observed assessment.

A consistent assessment

Assessors rate the same practice cases independently and compare their evidence-based reasons before assignment. Differences are resolved by examining the evidence and rating anchors. Maintain records of training, observations, and calibration.

Conflicts and independence

Before each engagement, disclose financial, employment, consulting, family, and other relationships that could affect judgment. Do not assess an organization you currently advise. The independent reviewer must be separate from the applicant and assessor and must confirm no unresolved conflict.

Continuing oversight

Review assessor performance through report quality, substantiated appeals, observed practice, and repeat calibration. Limit assignments to demonstrated competence. Document corrective training, restrictions, and removal of authorization where needed.

Evidence Principles

A defined protocol for sufficient, traceable assessment evidence.

Evidence period

Use the most recent 12 complete months, ending no more than 90 days before fieldwork, plus current controls and material events through the decision date. Organizations with less than 12 months of operating evidence may use the framework for readiness assessment but do not qualify for certification under this edition.

Evidence register

Assign each item an identifier, owner, creation date, reporting period, applicable criterion, source, confidentiality classification, and assessor conclusion. Record limitations and any contradictory evidence. Retain a traceable path from finding to source without copying unnecessary personal information.

Triangulation

Use at least two independent evidence types per criterion, including one operational record or verifiable result. Interviews and policies alone are insufficient. Compare organizational records with stakeholder feedback and direct observation where relevant. Investigate contradictions before assigning the final rating.

Records sampling

For each material service process, inspect at least 10 records or all records if fewer than 10 exist, spanning at least three months within the evidence period. Include successful cases, delayed or failed cases, and complaints when present. This is a minimum screening sample, not a statistical assurance claim. Expand the sample when exceptions, risk, diversity, or inconsistent results warrant it; document the reason for stopping.

Locations and suppliers

Review central governance and every location included in the certificate scope. Remote review is permitted where the same evidence can be verified; use direct observation for activities that cannot be adequately assessed remotely. Examine outsourced activities that materially affect scoped outcomes. An unreviewed location cannot be included merely because another location performed well.

Insufficient or disputed evidence

Do not infer compliance from missing records. Record the gap, request clarification, and defer the decision if evidence remains insufficient. Treat unexplained material inconsistencies as a major finding; suspected deliberate manipulation triggers integrity investigation and blocks certification.

Handling and retention

Access is limited to authorized assessment and review roles. Record agreed storage locations and transfer methods before collecting evidence. The scheme requires a six-year decision-record retention period, subject to applicable requirements and contractual restrictions; source evidence should be minimized and disposed of when no longer needed.

Stakeholder Feedback

A repeatable protocol for sampling, collection, and interpretation.

Define the population

Identify people who used or depended on the scoped services within the evidence period. Document population size where known, material user groups, service channels, locations, and exclusion reasons. Employee feedback may supplement beneficiary feedback but cannot replace it.

Response and coverage rules

For a population of 20 or more, obtain at least 20 valid beneficiary responses, with at least five from each material group unless the group contains fewer than five people, in which case invite all. A material group represents at least 10% of the population or has a distinct high-risk, accessibility, or service experience. If the total population is below 20, invite all and obtain at least 60% participation, rounded up, with at least two independent interviews; for a one-person population, interview that person and disclose the limitation. These are minimum evidence rules, not statistical representativeness guarantees.

Selection and independence

The assessor approves the sampling plan before collection. Use a complete contact frame and randomized selection where practical; document alternatives. The organization may facilitate access but must not select only satisfied users, screen individual answers, condition service on participation, or coach responses. Collect responses through an assessor-controlled channel.

Core questionnaire

Use a five-point scale from strongly disagree to strongly agree, plus not applicable: 1. Information about the service was clear. 2. I could access the service I needed. 3. The service was delivered as promised. 4. The service was completed within the communicated time. 5. I was treated respectfully. 6. I could obtain help or resolution when needed. Add optional free-text questions about strengths and improvements. Adjust wording for context without changing the intended concept; record translations and adaptations.

Validity and analysis

Exclude duplicates, ineligible respondents, blank submissions, and responses with documented integrity problems; preserve exclusion counts and reasons. Report invitations, valid responses, response rate where calculable, missing answers, group coverage, and question distributions. Favorable percentage means agree plus strongly agree divided by valid applicable answers. Do not directly convert satisfaction percentages into certification points.

Protection and follow-up

Explain purpose, voluntary participation, intended use, and confidentiality. Do not publish identifiable comments or group breakdowns with fewer than five respondents. Investigate conflicts between feedback and service records. If minimum coverage cannot be achieved, record evidence insufficiency and defer certification rather than lowering the requirement.

Scoring & Decisions

A transparent rubric with explicit gates for certification.

The calculation

For every criterion, rate four components: approach (20%), implementation (30%), results (30%), and learning (20%). Give each component a level from 0 to 4. Criterion points = 50 x [(0.20 x approach + 0.30 x implementation + 0.30 x results + 0.20 x learning) / 4]. Sum the 20 criteria without intermediate rounding. Report one decimal place; determine qualification from the unrounded total.

Approach and implementation anchors

Level 0: absent or unsupported. Level 1: informal, reactive, or isolated. Level 2: documented and used in a material part of the scope, with significant gaps. Level 3: consistently deployed across the relevant scope, with clear ownership and controlled exceptions. Level 4: systematic, risk-aware deployment supported by independent checks and demonstrated adaptation. A document without implementation evidence cannot establish deployment.

Results and learning anchors

Results: 0 = no trustworthy results; 1 = isolated measures without a usable baseline; 2 = reliable baseline with mixed or limited outcomes; 3 = sustained results against relevant targets over 12 months, with gaps explained; 4 = sustained strong outcomes supported by valid comparative context and segmentation. Learning: 0 = no review; 1 = ad hoc reaction; 2 = recurring review with incomplete follow-through; 3 = completed actions with verified effects; 4 = repeated improvement cycles with sustained benefits and transfer of learning. Award the highest level fully supported by evidence; do not use fractional levels.

Threshold and dimension floor

A qualifying assessment requires at least 800/1,000 and at least 120/200 in each of the five dimensions. No criterion may be omitted or reweighted. Where the organization uses different terminology, assess the equivalent function and record the mapping. If a criterion cannot be meaningfully assessed, redefine the scope or decline certification.

Mandatory gates

Evidence must be sufficient and authentic; the required stakeholder coverage must be achieved; the category module must be covered; assessor independence must be established; and all critical and major findings must be closed. Fees and commercial considerations do not affect the score or decision.

Finding classifications

Critical: fabricated evidence, coercion of respondents, deliberate concealment affecting the decision, or a substantiated serious uncontrolled risk within the assessed scope. Major: a missing required system, systemic implementation failure, materially unreliable evidence, or repeated ineffective corrective action. Minor: an isolated lapse that does not undermine the system or evidence sufficiency. Every finding must identify its criterion, evidence, impact, and closure requirement.

Illustrative calculation

For a criterion rated approach 3, implementation 4, results 3, and learning 2, the weighted level is 3.1 and the score is 38.75/50. An illustrative dimension with four such criteria totals 155/200. Five dimensions at that level total 775/1,000 and do not qualify. These figures are examples, not an assessment result.

Complaints & Appeals

Defined review steps, time limits, and independent outcomes.

Complaint route

A complaint concerns service, conduct, confidentiality, or mark misuse. Record the complainant's details, subject, evidence, and requested remedy in the scheme case register. Acknowledge within five business days, assign an uninvolved reviewer, and provide a reasoned response within 30 business days, or a documented explanation and revised date.

Appeal route

An applicant or certificate holder may appeal a decision within 30 calendar days of receiving it. Identify the contested decision, grounds, supporting evidence, and requested outcome. Acknowledge within five business days. The reviewer must not have assessed the organization, made the original decision, or have a material conflict.

Review and resolution

Review the original record and relevant new evidence, seek clarification where needed, and record the outcome with reasons within 30 business days unless a justified extension is notified. The outcome may uphold, amend, or return the decision for reassessment. Communicate any correction and update the certification record where applicable.

Protection and status

Do not retaliate against a complainant or appellant. Protect confidential information and disclose it only as necessary for a fair review. An appeal does not automatically lift suspension or extend an expired certificate. Submit complaints and appeals to contact@greatentity.com, identifying the engagement or decision concerned.

Assessment Fees

USD 3,000 in two stages, with the final balance payable only after passing.

Total fee: USD 3,000

The total assessment fee is USD 3,000, paid in two stages: USD 800 to begin the assessment process and USD 2,200 after a successful assessment, before the certificate is issued.

First payment: USD 800

The initial USD 800 payment is required to start the assessment process. This fee is non-refundable, including if the organization does not pass.

After passing: USD 2,200

If the organization passes the assessment and receives independent approval, the remaining USD 2,200 becomes payable. The certificate is issued only after this balance has been received and confirmed.

If the organization does not pass

The initial USD 800 is not refunded. The remaining USD 2,200 is not payable, and no certificate is issued.

Payment arrangements

Contact contact@greatentity.com for payment instructions and quote your application reference. Receipt of payment is confirmed against your application.

Independent assessment

Payment does not guarantee a passing result. Assessment findings and approval remain based on the published criteria and an independent review.