

# Assessing and Building Your Organization's Capacity

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## 7.1 Overview

Whether you have received a USAID award, have been working as a subrecipient on another organization's award, or have never received funding from USAID, your organization can achieve its goals by focusing on common guiding principles and building the systems and structures necessary to support it for the current grant and future opportunities.

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Organizational development, technical expertise, quality programming, and growth are not attained automatically. Most organizations work at achieving their missions by using a systematic organizational development framework that includes:

- **Conducting Organizational Assessments**—Analyzing your organization's current activities, structures, resources, and capabilities.
- **Prioritizing Capacity Need**—Developing an organizational improvement plan.
- **Focusing on Long-Term Strategic Planning**—Defining where your organization hopes to be in the future ([see chapter 8](#)).

This chapter contains information and a set of assessment activities that can help an organization better understand its policies and managerial, financial, and administrative systems ([7.3.1](#)). Such assessments are not required, but many organizations choose to do them during start-up and yearly thereafter. Should you decide to conduct an organizational self-assessment, this chapter provides guidance on how to examine your organization's assets, such as funding, reputation, and skills ([7.3.2](#)), as well as the activities and the services you provide ([7.3.3](#)). Taken together this information will help to create a capacity-building action plan ([7.4.1](#)), which will enable your organization to more effectively carry out its programs and serve the communities in which you work.

## Objectives

- Determine what systems and structures your organization should have in place to be eligible for USAID or other funding and to achieve its goals.
- Discover your organization's potential by better understanding its unique abilities and assets.
- Review the activities and services your organization provides to better meet the needs of beneficiaries.
- Unite your organization behind a common mission, goals, objectives, and an action plan.

## Key Terms and Acronyms

- **Acquisition**—A USG purchase or contract to obtain something for its own use. This includes products, commodities, or services.
- **Capacity Building**—Strengthening the ability of an organization to manage itself and achieve its mission effectively.
- **Governance**—The process of providing overall vision, direction, purpose, and oversight to an organization through a structure—a Board of Directors—separate from the day-to-day management of the organization.
- **Management**—The day-to-day operation of the organization.
- **Terms of Reference**—Provisions that describe the purpose and structure of a project, usually created during the early stages of project management.

## 7.2 Getting Started

Around the world, thousands of NGOs are responding to various social, economic, and political challenges. These NGOs range from small groups of community-based volunteers and faith-based organizations to regional and international organizations. While some of these organizations employ full-time staff and secure significant donor funding, others operate on small budgets, relying on volunteers and the efforts of community leaders who support them. Organizations like these may identify important needs in their communities, but have very limited resources to address them. Frequently impeded by lack of funds, personnel, and leadership, these organizations are successful

at meeting some needs, but may want to increase their services or their scope to better serve beneficiaries and achieve lasting results. To do this, organizations need to build their capacity.

## 7.2.1 What Is Capacity Building?

Capacity building is the structured process of improving the efficiency and effectiveness of an organization to achieve its purpose and provide quality services by strengthening its organizational and technical abilities.

Specifically, capacity building attempts to:

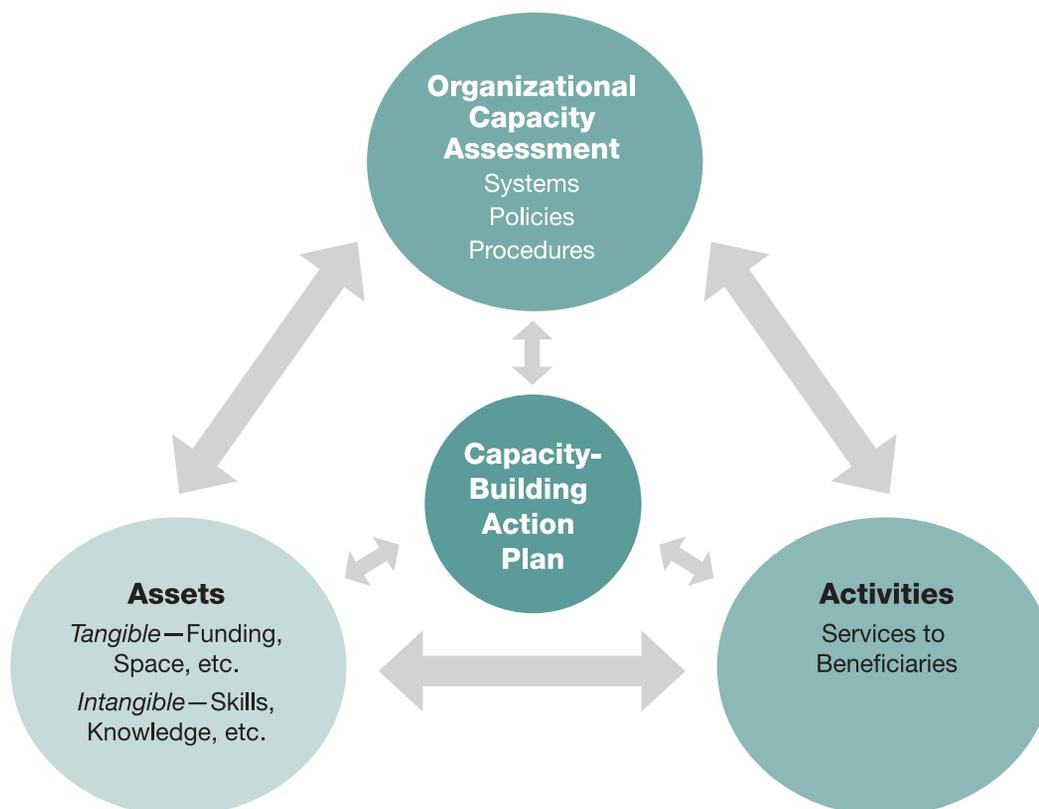
1. *Build a stronger, more sustainable organization*, including establishing formal or systematic organizational structures and developing and implementing long-term planning and strategies.

2. *Improve administrative and program management systems and abilities*, including setting up a strong accounting system, improving the process of planning and managing projects, or hiring an M&E specialist.

3. *Strengthen technical expertise*, through hiring or training staff or volunteers in program planning and design, best practices, and other similar technical areas.

This chapter provides three ways to view your organization, first by looking at its systems, policies, and procedures; second, by focusing on its assets (not just money); and, third, by examining its activities and/or services. Each perspective offers different insights into the organization's strengths and challenges. Those insights provide the building blocks to help you create your Capacity-Building Action Plan (see Figure 42).

Figure 42—Components of a Capacity-Building Action Plan



## 7.2.2 Assessing an Organization's Current Capacity

The first step is taking a thorough look at the organization's systems, assets, and activities and asking, "Where are we now?" There are numerous activities that an organization may pursue to answer this question. However, determining which activities to undertake is a challenge, because organizations often do not know what systems are best suited for the tasks at hand, unless they go through a checklist of requirements and assess their own systems against this list.

Later, when the organization is ready, it may ask, "Where do we want to go from here?" Are there new services for beneficiaries or new areas we should pursue?" To answer these questions, the organization needs a plan. Strategic planning is the process of creating the bridge that links current activities and funding to a longer-term vision and plan. [Chapter 8](#) of the *Guide* provides a framework for undertaking a strategic planning process.

## 7.2.3 Who Should Lead the Assessment Process?

The first key decision is to determine who will facilitate capacity building overall. One option is to bring in an external expert. Using a consultant to conduct the assessment has several benefits. Ideally, a good consultant offers an objective view of your organization, brings knowledge of what other organizations have gone through in similar situations, and helps to tap into a network of other experts who can help you. Use of a consultant also frees you to concentrate on your core responsibility. That said, this process can be effectively managed within your organization by staff, particularly if financial resources are not available to pay for consultants.

## 7.2.4 Five Tips for Building Organizational Capacity

### 1. Create a capacity-building task force.

One person cannot undertake strengthening and growing an organization. Creating a special team to help define goals and carry out a capacity-building action plan will improve chances of success. Be creative about building this team. Consider recruiting competent representatives from the communities you serve as well as volunteers, staff members from different offices (if available), and some members of the Board of Directors.

### 2. Prioritize, set achievable goals, and do the simple things first.

With capacity building, it is important to separate the work you can do from that which you must do. Set goals that focus on what must be done and make sure these goals are achievable. If getting started becomes a challenge, take on a few simple tasks first. The momentum from a small amount of progress can help energize the organization to take on bigger challenges.

### 3. Set aside capacity-building time.

Some smaller organizations barely have the staff or resources necessary to meet existing service-delivery demands. So, when is there time for capacity-building activities? Set aside designated time to focus on organizational growth. This may mean a few hours a week or a day once a month. The investment in time spent now will pay off later.

### 4. Involve the whole organization.

Changes in an organization may cause anxiety. Staff may wonder, "Will the new accounting system mean I lose my job?" or "Will these new efforts take our focus away from what I believe is important?" One way to address these concerns is to involve the whole organization in the effort to strengthen

and grow the organization. Communication at staff meetings, special team exercises, and establishing clear avenues for staff involvement are essential.

#### 5. Tap into free resources and opportunities for funding.

There are numerous efforts underway to build the capacity of organizations so they can better deliver quality services in the places where they are needed. There are free online resources (for example, [www.NGOConnect.Net](http://www.NGOConnect.Net)), NGO networks, and even opportunities for grants to help expand an organization's capacity-building efforts. The experience of researching tools, building your network, and applying for funding is, in itself, capacity building and can set in motion efforts to achieve the organization's capacity-building goals. It may also be possible to identify other NGOs in the community that have similar needs and pool resources for training to meet these needs.

## 7.3 Conducting Your Organizational Assessment

### 7.3.1 Organizational Capacity Assessment

An organizational capacity assessment is a process for identifying an organization's current strengths and weaknesses. It allows you to take a snapshot of the structures, policies, systems, and processes that support an organization and use them to help develop a list of activities to build that organization's specific capacity-building action plan.

In conducting a typical assessment, the organization discusses areas of its operation, noted in Figure 43. It is based on an assessment tool and can help you take a first look at your organization's health.

Answering the questions should offer a fairly clear picture of the systems and structures currently in place as well as hints about where there may be gaps.

An assessment should be repeated after a year to determine how the organization's capacity has changed and to identify new gaps and strategies to continue to improve the efficiency and effectiveness of the organization.

#### 7.3.1.1 Additional Online Organizational Assessment and Capacity-Building Resources

In addition to an assessment tool that focuses on finance, administration, and organizational development, there are assessment instruments that stress other aspects of your work, including program performance, technical programmatic areas, and monitoring. Most tools can be customized to fit your particular organization's needs. The best tools are used in a participatory manner, and the assessments are undertaken as a team exercise. The key is to get a wide range of involvement and opinions and to guide those ideas toward an action plan that everyone can support.

**Figure 43—Organizational Capacity Assessment Checklist****1. Governance**

- ✓ Do you have a mission statement or vision? Strategic objectives and/or goals? Have you written them down and shared them with the entire staff?
- ✓ Do you have a Board of Directors or Board of Trustees? Do Board members meet regularly, and what is their purpose? Do they have some sort of terms of reference written down? Do you have an organizational chart with reporting lines?
- ✓ Do you have legal status to operate within the country where you are working?
- ✓ Is your organization registered with the appropriate ministry or department of your government?
- ✓ Do you have a succession plan?

**2. Administration**

- ✓ Do you have documented operational policies, procedures, and systems?
- ✓ Do you have travel policies and procedures?
- ✓ What are your documented procurement procedures, and are they compliant with USG standards?
- ✓ Do you have fixed-asset control systems?
- ✓ Is there a branding and marking plan?

**3. Human Resources**

- ✓ Do you have written job descriptions for each staff member?
- ✓ Do you have recruitment and retention policies?
- ✓ Are there qualifications for each staffing position?
- ✓ Is there a personnel policy manual?
- ✓ Are there staff time and performance management policies?
- ✓ Is there a staff professional and salary history documentation?
- ✓ Is there a staff salary and benefits policy?
- ✓ What is the role of volunteers and interns?
- ✓ Do you have an employee handbook that has been shared with all staff?

**4. Financial Management**

- ✓ Do you have an accounting system in place?
- ✓ Do you have accounting policies?
- ✓ Do you have a procurement policy and system?
- ✓ Are you regularly creating financial status reports?

- ✓ Do you have a fundraising strategy or plan?
- ✓ Do you have a plan for generating cost share as part of your project?
- ✓ Do you undertake regular audits?

**5. Organizational Management**

- ✓ Do you have a strategic plan?
- ✓ Do you have strategies for workplan development?
- ✓ How do you address management changes?
- ✓ How do you manage knowledge?
- ✓ How do you involve stakeholders?
- ✓ How do you address new opportunity developments?

**6. Program/Project Management**

- ✓ Do you comply with A-122 cost principles?
- ✓ If you have subgrantees, what systems are in place to manage these organizations?
- ✓ What documentation is undertaken for technical reporting?
- ✓ What linkages do clients have to services of other organizations (referrals)?
- ✓ How is the community involved in the project?
- ✓ What consideration is given to culture and gender?

**7. Project Performance Management**

- ✓ What is the current project Implementation status?
- ✓ What procedures are in place for field oversight?
- ✓ What are the service quality standards to which the organization adheres?
- ✓ What are the supervision guidelines to ensure that program quality is achieved?
- ✓ Do you have a monitoring and evaluation plan?
- ✓ How do you determine quality assurance of the services being delivered?
- ✓ Who is involved in official communication within the organization?
- ✓ Are staff part of the decisionmaking process?

**8. Leadership and Team Dynamic**

- ✓ What type of management does the organization possess, and how does this influence the operation of the organization?

Figure 44 contains several organizational assessment resources available online. While it is not a definitive list, these resources can guide your organization through the process.

**Figure 44—Online Organizational and Capacity-Building Resources**

Tools and Resources	Description
Organizational Capacity Resources ( <a href="http://www.ngoconnect.net">http://www.ngoconnect.net</a> )	A wide variety of resources on everything from budgeting to organizational governance compiled by CAP on the NGOConnect Web site
Institutional Development Framework (IDF) <a href="http://www.ngoconnect.net/cap-idf">http://www.ngoconnect.net/cap-idf</a>	An online series of modules to help NGOs assess their organizational capacity
Pact Resource Center ( <a href="http://www.pactworld.org/cs/resource_center/featured_resources">http://www.pactworld.org/cs/resource_center/featured_resources</a> )	A selection of resources for capacity building
Impact Alliance Resources ( <a href="http://www.impactalliance.org/ev_en.php">http://www.impactalliance.org/ev_en.php</a> )	An online community supporting organizations with their capacity-building efforts; the site includes resources on a variety of topics
The Manager <a href="http://erc.msh.org/TheManager/index.cfm">http://erc.msh.org/TheManager/index.cfm</a>	A quarterly publication by Management Sciences for Health that provides health professionals and others with information and practical tools they need to manage programs. Online editions are currently available in English; French, Spanish, and Portuguese editions are forthcoming
Management Accounting for Non-Governmental Organizations (MANGO) <a href="http://www.mango.org.uk/guide/resources.asp">http://www.mango.org.uk/guide/resources.asp</a>	A Web site that provides high-quality resources, training, and networking opportunities to help NGO staff and trustees improve their financial management capacity

## 7.3.2 Considering Organizational Assets

The purpose of inventorying your organization’s assets is to take a fresh look at the organization’s resources, that is, the pillars supporting the organization’s ability to deliver on its mission. Assets include people, skills, knowledge, financial resources, relationships, products, geographic coverage, and the ability to connect with the people in the communities you serve.

In NGOs, the Board of Directors is typically made up of volunteers and should be separate from the organization’s management and staff. It may be comprised of community leaders, representatives of beneficiary groups, the organization’s founders, and private donors. The Board should not include members of the organization’s management team or other paid staff of the organization. The Board generally meets regularly with the organization’s Executive Director and management team to review progress. Its primary function is to provide oversight to the organization, including ensuring that it fulfills its mission, lives up to its values, and remains viable for the future.

### 7.3.2.1 Board of Directors and Good Governance as Assets

One of an organization’s key assets is its Board of Directors. The Board, needed in most countries to enable an NGO to register and operate legally, mainly provides oversight, but its members may also be advocates and fundraisers for the organization.

**Governance** is the process of providing overall vision, direction, purpose, and oversight to an organization through a structure—a Board of Directors—separate from the day-to-day management of the organization.

**Management**, on the other hand, involves the day-to-day operation of the organization.

Organizations are governed in different ways. Some Boards meet frequently, especially when organizations are young or are going through challenging changes. Other Boards are more detached, meeting quarterly or annually to review financial and performance reports and to set goals for the coming year.

Although not an exhaustive list, the Board is essentially responsible for:

- Defining expectations for the organization by:
  - setting and maintaining vision, mission, and values;
  - defining or helping to define direction (for example, helping to develop/approve long-term strategic plan, approving annual workplans); and
  - creating and/or approving the organization's policies.
- Granting authority by:
  - selecting, managing, and supporting the organization's Chief Executive Officer (CEO).
- Verifying performance by:
  - ensuring compliance with governing document (for example, charter);
  - ensuring accountability and compliance with laws and regulations; and
  - maintaining proper fiscal oversight.

Board members may serve as public faces of the NGO, advocating on the organization's behalf. They may also take on fundraising for the organization by donating directly or soliciting support from other sources. (For more information on fundraising, see [chapter 9](#), "Seeking Future Funding.")

The organization's management team receives its authority from the Board of Directors. This helps to ensure that the management team is accountable to the donors, community leaders, and beneficiaries. Management also receives general direction from the Board through the development of annual goals and long-term strategic plans.

Management is responsible for day-to-day implementation of policies, procedures, and

activities to accomplish the goals of the organization. These include:

- communicating expectations—mission, strategy, policies—to the entire staff;
- managing day-to-day operations and program implementation to fulfill expectations; and
- reporting results to the Board.

It is critical to distinguish between the responsibilities of the Board and those of management. When roles are clearly defined, an organization will be better able to function and to meet the needs of clients, beneficiaries, and other stakeholders; deliver quality programs; and comply with rules and regulations.

If an organization is struggling to find the right balance, it should review its charter or other governing document, the Board's terms of reference, and the job descriptions of senior management staff to see how these parameters are defined. If these sources do not provide clarity, the Board should define responsibilities and procedures more precisely. In the end, it is part of governance—and therefore one of the Board's responsibilities—to ensure that organizational roles and structures are clearly defined.

The organizational capacity assessment ([7.3.1](#)) discussed in this chapter is a process the management team should undertake with the approval of and oversight by the Board of Directors. Where possible, the Board may want to be directly involved in some or all activities. If there is no Board of Directors or similar structure governing your organization, you may want to address that before taking on any capacity-building activities. Several online resources are available to help you establish a governance structure for your organization.

### 7.3.2.2 Inventory Organizational Assets

For this exercise, tour your office, project sites, and other sites where your organization works. Starting with the categories listed below, talk

with staff, volunteers, and others and note the resources you see that make your programs and organization run. If several people in your organization are participating in this exercise, have each person create a list separately, then come together and compare the results.

Consider these asset categories of your organization:

- **People**—Both staff and volunteers, including the Board of Directors. Who are they? What are their roles? Do they understand and fulfill their roles? How long have they been a part of the organization?
- **Equipment**—Computers, office furniture, vehicles, and other important items. Where or how were they obtained? Was anything donated?
- **Space**—Any real estate or property you use—buildings, office space, meeting space, a clinic, a community garden. Does it belong to the organization or the community? Is it rented or donated?
- **Skills**—What formal training have your employees received, whether through degree programs or short-term seminars? What skills do people have, even skills they do not use in their current positions? Is someone a good gardener or mechanic or skilled at working with computers?
- **Funding and Income**—Money, or lack of it, is often the biggest roadblock between what an organization can do and what it wants to do. What are the organization's sources of funding or income? Does it have any money in the bank? What options does the organization have for securing additional funds? Can the organization fund any of the capacity-building efforts out of its own funds, or must it wait to secure additional funds before moving forward?
- **Relationships and Reputation**—What relationships does the organization have with local and regional leaders? What relationships does the organization have with other NGOs in the community or the region, or with private companies and businesses? Does it have any existing relationships with donors? Most important, what is its relationship with the

communities you serve? What is your organization's reputation? Relationships and your organization's reputation are not always easily quantified, but you should not undervalue this network of relationships and your organization's reputation.

- **Knowledge and Experience**—Think about the special knowledge and experience people in your organization, including those on your Board, may have. This is slightly different from what is listed under "skills." Your organization's experience may have taught you important things about your community and its people, culture, traditions, etc.
- **Mission**—Sometimes, what binds people together in a community is a belief in a common mission. For some, that belief is religious faith; for others, it may be community ties, national pride, or patriotism. A strong belief in a mission is a great motivator and can often be more powerful than money in getting things done.

### 7.3.3 Inventory Activities

Once you have assessed the organization's systems, policies, procedures, and assets, it is time to consider the organization's activities. While the organizational assessment and action plan (7.4.1) provide a blueprint for improving the current operations of an organization, a strategic plan guides the overall programmatic direction an organization will take. When developing a strategic plan, an organization looks at what it is doing now and asks what it would like to do in the future.

An organization may start with a simple inventory; for example, for each activity, you may note who is involved, how often the activity takes place, how much time you spend on it, any costs related to it, and how you measure its outcome. You may estimate time spent by your organization in each area, and you do not have to include every last detail. The goal is to get a general overview of what your organization currently does. An example appears in Figure 45.

**Figure 45—Sample List of Organizational Activities**

Activity	Who	How Often	How Much Time	Costs	Outcome Measure
Fundraising	Executive Director	Monthly	2–3 days/month	No direct costs	<ul style="list-style-type: none"> <li>• Number of RFPs responded to</li> <li>• Amount of US\$ raised</li> </ul>
Palliative Care Home Visits	Volunteers	Daily	30 minutes per visit	Home-based care kits, transportation	Number of households visited per month
Training Volunteers	Training Manager	Monthly	<ul style="list-style-type: none"> <li>• 5 days of training</li> <li>• 10 days of planning, prep time, and post-training assessment</li> </ul>	Training materials, meeting room facility, refreshments for volunteers	Number of volunteers trained

### 7.3.3.1 Activity Wish List

Organizations often do not have the time to do everything they want to do, nor do they always know what needs to be done. Once you complete the list of current activities, begin a similar list of activities you need or want to do, but for which you do not currently have the time or resources.

Start with these questions:

- What services do our beneficiaries need in addition to those we already provide?
- What activities have we seen other organizations do that we could incorporate into our programs? Why do we want to incorporate them? Are they consistent with our mission and vision?
- What activities have we wanted to implement for a long time but have had to postpone because of other pressing issues?

- What are some administrative management issues that we have not dealt with properly?

As you list each activity, think about when you ideally would like to begin each activity, assuming you had the resources and time. Is a particular activity urgently needed? Is it needed in the next few months, or is it something that would be nice to do?

Finally, for each activity, list what you would need (for example, funding, training, personnel) to make each one happen, as in Figure 46. If you note several things that are preventing you from moving forward, try to determine whether any one particular roadblock is in the way. Keep in mind how the lack of certain assets may be affecting your ability to move forward. Down the line, making this link will help you prioritize your next step. (For more information on securing funding to attain essential assets, see [chapter 9](#).)

**Figure 46—Sample List of Activities and Needed Materials**

Activity	When is it needed?	What would it take?
Upgrade accounting system	Urgent	New software and training
Implement Voluntary Counseling and Testing (VCT) program	Next 3–6 months	Funding for training and test kits, volunteers, and at least one professional staff
Train volunteers to use TB/HIV home test kits	6–12 months	Technical assistance, TB/HIV home-based care kits

## 7.4 Guide to Systems and Structures Needed to Succeed

Earlier, you listed current (7.3.3) and potential future activities (7.3.3.1) as well as the resources your organization has on hand. In this section, you compare that picture with a generic picture of the basic systems and structures an organization needs to succeed. This will help your organization think about the gaps it may need to address to successfully manage USAID- or other donor-funded programs.

### 7.4.1 Defining Your Capacity-Building Objectives and Creating an Action Plan

The final step in assessing your organization is to bring all of your previous work together by comparing your existing organizational capacity, assets, and activities with your goals for the future to help identify gaps and prioritize next steps. The result should be the development of a capacity-building action plan for the organization.

The most difficult task in developing this plan is setting priorities. The best way to help resolve differences of opinion is to have your team refocus on the mission of the organization. A well-developed vision or mission statement can help everyone in the organization to understand the overall priorities and explain why resources are allocated to advance those priorities.

#### Set Organizational Capacity-Building Objectives

With your capacity-building task force, review the capacity issue lists you created during your organizational assessment (7.3). Then discuss the following questions among staff and even, if appropriate, beneficiaries:

1. Given the work you are currently doing (7.3.3), what are you not doing well? What is inhibiting you from doing these activities better? Is it lack of funding, training, personnel, or something else?
2. Are the activities listed on your activity wish list (7.3.3.1) short-term or long-term priorities? If you were to select the one or two most critical items, which would they be? What do you need to make these priorities happen?
3. Looking at your asset inventory (7.3.2.2), how do your current resources and capacity align with the needs of your programs? Can you handle them with existing resources, or do you need to fill in resource gaps first?

The analysis should identify a number of different things to work on. If there are more than five, they may have to be prioritized. If the capacity-building plan is much bigger than that, it might be hard to get started. Start small and save the rest of the list. As first goals are achieved, begin work on successive items.

Take each priority item and formulate a specific goal statement that articulates what you want to do and sets a deadline—for example, “We want to develop a functional volunteer recruitment and management system in the next six months.”

Next, identify a point person for each goal, but do not expect this person to do all of the work. In fact, many people may contribute to the effort, but that one person should be responsible for facilitating and tracking progress and reporting back to the rest of the team.

#### Breakdown of Goals into Specific Tasks

What steps are necessary to reach each goal? For each step or task, think about what resources (money, people, etc.) are needed to complete it. Then estimate the time it will take to complete it. Do not worry about getting this exactly right; if you are not sure, do your best to guess. You can always adjust your estimates later.

If time needed to complete each task under a goal is totaled, can you still reach that goal within the originally estimated time? If not, you might want to adjust your goal or figure out ways to complete the tasks more quickly.

## Document Your Action Plan

Build a document, spreadsheet, or project plan such as the one in Figure 47:

Figure 47—Action Plan Example

Goal #1: Recruit 10 new volunteers from the community in three months.			
Leader: Mary			
	Task	Resources	Time
1	Define volunteer roles	volunteer coordinator	two days
2	Design and print fliers	paper	one day
3	Host volunteer promotion at local market	all staff members	one day (must coincide with market day)
4	Hold meeting with prospective volunteers	volunteer coordinator	one day (one week after market day)
5	Conduct volunteer training	training coordinator, training materials	one day a week, for three weeks in a row (starting one week after prospective volunteer meeting)
6	Take volunteers out on supervised visits to beneficiaries	experienced volunteers	one day (one week after training)
7	Volunteer graduation ceremony	staff and volunteers, refreshments	one day (one week after completing supervised visits)

### Next Steps

The capacity-building task force should continue to meet regularly to assess progress. Be flexible and adjust plans as needed. Also, be sure to communicate regularly with the other members of your organization and create opportunities to involve them.

As your organization learns about itself and strengthens its organizational and technical capacity, staff may want to share their new knowledge and skills with your subrecipient(s) (if any). By applying lessons learned via its own assessment and planning process, the prime recipient can help lead its subs in identifying organizational assets, gaps, and priorities. Building subs' capacity helps them to better implement projects and grow as organizations.

It also can strengthen the relationship between the partners, with the goal of contributing to their mutual success.

When your organization has completed its assessment, the next question to ask is, "Where do we want to go from here?" Are there new services for beneficiaries that we can provide? Are there new technical areas that we should pursue? To answer these questions, the organization needs a plan. Strategic planning is the process of creating the bridge that links current activities, capacities, and funding to a longer-term vision and plan. [Chapter 8](#) of the *Guide* provides a framework for undertaking the strategic planning process.

## 7.5 Summary and References

Managing USAID-funded programs requires a solid organizational foundation to meet the required technical, administrative, reporting, and other demands. That does not mean that an organization must be perfect before it can take on these programs. But it does mean that, to be effective, one must understand where the organizational strengths and weaknesses exist and put programs in place to address any critical gaps.

At the same time, it is also important to build on your organization's unique abilities and assets. By building on your strengths, your path toward eligibility for USAID funding will be much shorter, and your capacity to carry out and sustain your programs will be much better. Especially when your organization comes together behind a common mission and plan of action going forward.

## References

- A Handbook of NGO Governance: The Central and Eastern European Working Group of Nonprofit Governance [http://www.icnl.org/knowledge/pubs/Governance\\_Handbook.pdf](http://www.icnl.org/knowledge/pubs/Governance_Handbook.pdf)
- Expert Discusses Effective Principles, Procedures for Nonprofits <http://useu.usmission.gov/Article.asp?ID=1DE58E9F-10A5-48A1-B002-EF8A788838E2>
- Board Source: Building Effective Nonprofit Boards <http://www.boardsource.org/>