# ORGANIZATIONAL CAPACITY ASSESSMENT

## A. GOVERNANCE

Objective: Assess the clarity of the organization's motivation, purpose, and stability by reviewing its guiding principles, structure, and oversight mechanisms.

### A1. Vision, Mission, and Values

Objective: To create a sense of shared ownership and common commitment to activities through articulated and shared goals.

| Subsection Checklist | Yes | No | N/A | Comments |
|---|---|---|---|---|
| Does the organization have a vision statement, mission statement, and statement of values? | | | | |
| Are the vision and mission used to set priorities? If so, please describe how. | | | | |
| Are these statements posted openly in the office or somewhere that staff and visitors can see? | | | | |
| Does the organization regularly review the vision and mission statements [for example, in conjunction with strategic and/or operational planning]? | | | | |

### A2. Governing or Advisory Board

Objective: Ensure that governing or advisory boards are committed to the organization and bring relevant knowledge and experience, provide guidance, support, and oversight to the organization's staff and operations.

| Subsection Checklist | Yes | No | N/A | Comments |
|---|---|---|---|---|
| Does the board have clearly defined terms of reference [TOR] that detail its primary duties? | | | | |
| Are board roles clearly differentiated from the executive roles? | | | | |
| Are there clear and documented criteria for becoming a board member? | | | | |
| Are there term limits and a system for electing or approving board members? | | | | |
| Does the board meet regularly and document its decisions with minutes? | | | | |
| How are board members involved in strategic planning, resource mobilization, and developing and approving organizational policies and budget and annual financial statements? | | | | |

### A3. Succession Planning

Objective: To assess the organization's ability to continue smooth operations and to manage programs in the event of an absence of, or shift in, leadership.

| Subsection Checklist | Yes | No | N/A | Comments |
|---|---|---|---|---|
| Is there a deputy [vice] or other staff/board member who can fulfill the duties of the Chairman/President for short or long periods? | | | | |
| Does the organization support capacity-building to ensure that others are able to take on or assist with the key functions of the organization's leadership [fund-raising, operations, and program quality]? | | | | |
| Is there a documented succession plan for the Chairman/President? | | | | |
| Is there a plan for handling a transition process. | | | | |

# Organizational Capacity Assessment Tool

Siddappa N.Byrareddy

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