

Iceland  \_\_\_\_\_  
Liechtenstein **Active**  
Norway **citizens fund**

# Organizational Development Matrix

to identify the NGOs' capacity building  
areas that can be improved

Material developed by



Fundația pentru  
Dezvoltarea  
Societății  
Civile

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# Introduction

The Active Citizens Fund program aims to develop the long-term sustainability and capacity of the civil society sector. In this regard, throughout the Program, in addition to the grant funding, the Fund Operator has proposed to make available to non-governmental organizations a number of useful tools for their development and consolidation efforts.

One of these tools is the present matrix, and its main purpose is to assist organizations in the management process, in managing the challenges related to achieving the objectives, sustainability and increasing the social impact. The tool gives organizations the opportunity to identify the needs, strengths and weaknesses of the following dimensions: Governance, Financial aspects, Information management, Monitoring and evaluation, Organizational structure, Leadership, Human resources management, Beneficiary involvement, Advocacy and External communication.

Based on the results of the self-assessment and in accordance to the Applicant's Guides, the organizations will be able to include in the projects applications within the Active Citizens Fund Program concrete organizational development activities adapted to their specific needs.

According to the general rules of the Program, it is possible to allocate up to 20% of the total budget of the project towards organizational development activities of the Applicant and / or of the partner Romanian non-governmental organization.

The document includes:

1. A self-assessment matrix for organizational development, which the members / employees / volunteers of the organization can apply in order to have an overview of the current practices of the organization and their efficiency.
2. Centralizing tables of the evaluation results.
3. An action plan model following the evaluation process.
4. A list of organizational development concepts to help a unitary understanding of the terms used in the evaluation process.

For the implementation of the instrument, organizations can request and receive consultancy directly from the Foundation for Civil Society Development, at the email address [daniela.mita@fdsc.ro](mailto:daniela.mita@fdsc.ro), contact person Daniela Mita.

This document is adapted from the material developed within the project "Organisational Development for Youth Organizations", co-financed by the ERASMUS + program of the European Union and implemented by a consortium formed by the Foundation for Civil Society Development (FDSC), the Centre for Information, Cooperation and Development of NGOs (CNVOS) and the European Network of National Civil Society Organizations (ENNA).

# How to apply the organizational development matrix

To properly apply the matrix, please follow the following steps:

1. Go through all 10 indicators proposed on pages 5 - 14: Governance, Financial Issues, Information Management, Monitoring and Evaluation, Organizational Structure, Leadership, Human Resources Management, Beneficiary involvement, Advocacy and External Communication.
2. For each of the 5 questions of each indicator it is necessary to "score" the current situation of the organization based on the descriptions provided, awarding points as follows: None = 1; Limited = 2; Partially = 3; Clear = 4; Comprehensive = 5. If the descriptions are somewhat similar, select the closest description that you think is appropriate. Centralize the scores in the table on page 15. Be honest and fair - the organizational development process should be as honest as possible. Put yourself in the position to answer the questions critically, in a realistic way. Remember that you do not apply this matrix to impress, but to express and project the future possibilities of the organization.
3. The application of the matrix is a participatory process - it is a collective exercise, involving as many members / employees / volunteers, members of the governance structure, beneficiaries and other stakeholders. We recommend the involvement of at least one person from various stakeholder groups of the organization. The evaluation on the basis of the matrix should be made individually, and then compared and averaged for all participants in this process, for a broader view of perceptions related to the development of the organization. Centralize all the answers in the table on page 17.
4. If you apply the matrix and you get the results, you are only halfway there. Based on your assessment, we encourage you to set short- and / or medium-term goals and try to solve potential problems in developing your organization through relevant activities. On page 18 you will find a proposed format for a useful and feasible action plan. Starting from this, identify the organizational development activities that can be supported through the Active Citizens Fund program and include them in the projects proposed for funding.

# 1. Governance

	None	Limited	Some	Clear	Comprehensive
<b>To what extent is the vision and mission of the organization clear?</b>	No written vision and mission	Written vision and mission, nevertheless the organization doesn't follow them in practice. The vision and mission are too broad/ they include too many aspects	Written vision and mission, followed in practice. There is a lack of agreement among members about the "raison d'être" of the organization	Clear expression of the vision and mission that is most of the times referred to in directing actions and setting priorities	Vision and mission are clearly written, reviewed/ evaluated, promoted and followed in all activities
<b>To what extent a strategic plan is implemented in the organization?</b>	No strategic plan	No written strategic plan, but some general guidelines exist	Written strategic plan, but not fully implemented	Written strategic plan that is implemented but not followed in all cases or evaluated	The organization has a strategic plan that is fully implemented and regularly reviewed/ evaluated
<b>What is the role of the governance body? (e.g. Board, General Assembly)</b>	The organization has no governance body	The governance body exists only formally (on paper)	The governance body has limited understanding of its role. Usually it only formally adopts the decision taken by the leaders of the organization	The governance body has a somewhat clear understanding of its role. Sometimes it is consulted for the strategic direction of the organization	The governance body has a clear role and responsibilities. It provides overall strategic direction for the organization and is actively fulfilling its tasks
<b>Is the composition of the governance body based on clear criteria which reflect a diverse background?</b>	No criteria for the composition of the governance body	Some criteria are established. Nevertheless the criteria are not followed for the actual composition of the governance body	Criteria for the governance body are followed. All members of the governance body have almost the same skills and knowledge	Criteria for the governance body are followed. Members have diverse skills and knowledge but mainly come from the same background	Criteria for the governance body are followed and the governance body has diverse skills, knowledge and background needed for the development of the organization
<b>Does the organization have policies on ethics/ values?</b>	No policies on ethics/ values	Some guidelines for principles on ethics/ values exist. However, there are no written documents in this regard	Written guidelines on ethics/ values exist. Nevertheless, they are not followed in practice (exist only on paper) and people are not informed about them	Written policies on ethics/ values exist but they are not fully implemented. Only a limited number of members are informed and aware about them	There are written policies on ethics/ values that are guiding the everyday life of the organization. The members of the organization are aware of them and are using them as a tool for decision making

## 2. Financial aspects

	None	Limited	Some	Clear	Comprehensive
<b>Is the organization aware of its legal (national) obligations?</b>	The organization is not aware of the legal requirements	The organization is not aware of legal requirements. It has an external or internal accountant	The organization is aware of basic legal requirements and trusts its accountant	The organization has a good understanding of general accounting practices and legislation for everyday actions	The organization has a deep understanding of legal re-quirements and accounting practices. Faced with new situations, it makes sure actions are in line with the law
<b>Does the organization have a sound financial management?</b>	Every person is in charge of its own projects/ activities with no coordination and no common practices/ procedures	Each person is in charge of its own projects/ activities. There is some coordination among projects, with no common practices/ procedures	Each person is in charge of its own projects/ activities with regular coordination and some common practices/ procedures in the organization	The financial management of the organization is supervised by one person who applies common practices/ procedures. There are no coherent practices/ procedures for monitoring	There is a dedicated person who monitors the incomes and outcomes/ all costs of the organization, tracks expenditure and cash flow, and makes sure the money is spent efficiently
<b>Does the organization follow a coherent financial planning?</b>	No financial planning	There is a financial planning only based on the previous year	The financial planning is foreseen coherently for the following year	The financial planning is coherent and foreseen for at least 2 years	The organization has a coher-ent financial plan that in-cludes a cash flow projection for more than 2 years
<b>To what extent does the organization have the capacity to ensure sustainable sources of income?</b>	No capacity for providing sustainable income	Limited capacity for providing sustaina-ble income mostly based on project writing. No person is directly involved in this activity	Some capacity for providing sustainable income. There is at least one person dealing with this issue but most efforts are concentrated towards project writing	Clear capacity to provide sustaina-ble income, more than project based. Neverthe-less this is not integrated at a strategic level/ ongoing basis	The organization has the strategic capacity to provide sustainable income for different projects/ programs/ activities using various methods (from prom project writing, to individual donors/ sponsorships etc.)
<b>Does the organization consider the diversification of its funds?</b>	The organization is dependent on only one source of income and is not seeking other	The organization has different sources of income but one of them prevails significantly (more than 50 % of its income comes from that source)	The organization has 2-5 different sources of income but they all come from the same sphere (for example public calls for proposals). 1 or 2 donors still prevail	The organization has 2-5 different sources of income whose shares are equally disbursed	The organization has over 5 different sources of income and none of them exceeds 20 % of the total budget of the organization. The financial resources are different in their status (public/ private, national/ EU, etc.)

### 3. Knowledge management

	None	Limited	Some	Clear	Comprehensive
<b>Does the organization have a sound institutional memory?</b>	No track records of past activities	There is some information on past activities that is not archived. Only one person knows the history.	There is some information available for past projects/ programs. The information mainly relates to short descriptions of projects implemented	Clear track record of past projects/ programs, including financial information. There is no information on impact/ results	The organization keeps track records of past projects/ programs and their results, including financial information for each of them
<b>Does the organization have a functional internal database system?</b>	No internal database system(s)	Some information for the organization is gathered in online or offline formats. There is not a coherent manner in which the information is gathered	An internal data-base system exists (e.g. server). Nevertheless there is not a coherent manner in which the information is gathered. There are no guidelines on how to use it	An internal database system exists and the information is structured. It is not fully used by members/ staff/ volunteers. There are no guidelines on how to use it	The organization has a functional internal database system (e.g. of beneficiaries, staff, volunteers, experts, donors etc.) which includes important information. There are guidelines on how to use it
<b>Does the organization rely on a specific management system?</b>	No system in place	Minimal practice for working with documents, but it is not coherent	Some practices of working with documents mostly online, but not offline (no hard copies are archived)	Clear practice/ procedure in working with documents online and offline, but not all members/ staff/ volunteers are using it	The organization uses functional management systems (e.g. online project management tools) that define working and storage of documents, used by everyone
<b>Does the organization use past learning?</b>	The organization does not collect any information so it can learn from past experiences	The organization has limited practice of using lessons learned and it is not shared with all members/ staff/ volunteers	There is a practice of using past information, but only for technical issues (e.g. project writing)	Past information and lessons learned are used to plan future activities. Knowledge is not shared with everybody	Past information and lessons learned are used to plan future activities and the knowledge is shared with all members
<b>To what extent the organization publishes a comprehensive annual report?</b>	The organization has no annual report	Some articles about the activity of the organization are published, but not inside an annual report	An annual report is published but not all important information is there	A coherent and informative annual report is published on the website. The report is not sent to members, volunteers and/or donors	The annual report is considered as an important communication tool and is prepared in a coherent manner, taking into account different stakeholders

## 4. Monitoring & evaluation

	None	Limited	Some	Clear	Comprehensive
<b>Does the organization have a practice for monitoring and evaluation?</b>	No monitoring and evaluation in the organization	Monitoring and evaluation are done only when requested by donors	Some standard activities are being monitored and evaluated but only to the extent of outputs. No other measurements taken into account	Clear practices of monitoring and evaluation undertaken only for specific activities (e.g. trainings, workshops etc.). There are no practices for tracking impact	Monitoring and evaluation is part of the organizational culture, included into everyday action and regularly up-dated/ reviewed. Monitoring and evaluation includes tracking of impact
<b>To what extent the organization monitors and evaluates goals and results of its activity?</b>	No monitoring and evaluation in the organization	Some practices in the organization for monitoring and evaluation. Nevertheless there are no specific items followed	Some practices in the organization that mostly monitor and evaluate activities (administrative)	The organization monitors and evaluates its overall goals, but does not put emphasis on results	The organization monitors and evaluates its overall goals and results
<b>To what extent the organization uses indicators for monitoring and evaluation?</b>	No monitoring and evaluation in the organization	Some practices to collect information for monitoring and evaluation. Nevertheless there are no concrete indicators set	The organization uses mostly quantitative indicators and evaluates progress compared to previous years	The organization uses simple qualitative and quantitative indicators and periodically reviews progress	Monitoring and evaluation is done on a daily basis. Goals are set and regularly monitored and updated through comprehensive qualitative and quantitative indicators
<b>Does the organization reflect and learn from its activity?</b>	No reflection or learning	Limited practices to reflect on the activities under-took. Nevertheless there are no learning outcomes underlined	Some practices to reflect and learn from the activities, mostly informal, not structured or documented	Clear practices to reflect and learn, in a participatory manner, having in mind feedback from beneficiaries/ stakeholders	The organization reflects continuously on its learning (from needs analysis, stakeholder mapping, collecting feedback, documenting and debriefing activities etc.)
<b>To what extent the organization uses learning outcomes to grow?</b>	No usage of learning outcomes	Limited practices to implement learning outcomes, mostly done informally	Some practices to use learning outcomes, only for activities and projects implemented	Clear and documented implementation of learning outcomes for all projects and programs	The organisation is using learning out-comes for its growth and integrates all results in the overall activity and specific projects/ programs

## 5. Organisational structure

	None	Limited	Some	Clear	Comprehensive
<b>To what extent the organizational structure is defined and functional?</b>	No structure defined inside the organization	No structure formally defined in the organization even though informal reporting lines are understood by members/ staff/ volunteers	A formally defined structure exists in the organization. Nevertheless this structure is not followed by members/ staff/ volunteers	Organizational structure is defined. Nevertheless there are some areas where reporting lines are not entirely clear	The organisation has a well-defined structure and clear reporting lines that are functioning in practice. Members/ staff/ volunteers understand the interdependency of all positions
<b>To what extent the members/ staff/ volunteers of the organization understand their roles and responsibilities?</b>	No roles or responsibilities defined.	No formally defined roles and responsibilities, but informal division of work is established	The roles and responsibilities are formally defined, but they are not respected in all cases	The roles and responsibilities are defined and recorded. There is a job description for each position but the tasks are not always linked to the persons	There are clear roles and job descriptions for each position used for the division of responsibilities. The organization is using them when assigning new tasks
<b>To what extent the competencies of people working with the organization correspond to the organization's needs?</b>	New people are engaged based on availability and opportunity, not on organization needs	Limited specific expertise for people working with the organization that does not correspond to the needs	The organization knows which skills/ expertise it lacks but does not actively try to include such expertise	The organization knows which skills/ expertise it lacks and has a plan on how to include appropriate people in the organization. However, there are inconsistencies at some level (e.g. recruitment based on previous involvement)	The organization knows which skills/expertise it lacks and includes appropriate people in the organization based on clear policies followed
<b>How does the organization take decisions?</b>	There is no policy on decision-making . All decisions are done ad hoc.	Some consultations between closest members of the organization, but decisions are generally done by the leader. The decisions are not communicated	Consultations between members of the organization, but decisions are generally done by the leader. The leader informs members/ staff/ volunteers	The decision-making process includes members/ staff/ volunteers. It doesn't include other stakeholders (beneficiaries, donors etc.)	The organization's decision-making process is participatory, transparent and communicated to all relevant stakeholders
<b>Does the organization take decisions based on its vision and mission?</b>	The decision-making process is arbitrary and does not rely on vision and mission	The decision-making process is arbitrary and relies mostly on one leader. His/her views are not always in line with the organization's vision and mission	The organization consults the vision and mission when taking decisions. The decision still relies on one leader, that is in line with the vision and mission	The organization consults the vision and mission when taking decisions. However, they are not always followed (e.g. if a funding opportunity appears the organization will neglect vision and mission)	The decision-making process is dictated by the vision and mission and there are no decisions taken based on specific context, politics or funding opportunities

## 6. Leadership

	None	Limited	Some	Clear	Comprehensive
<b>To what extent there is an appropriate mix of leadership and management in the organization?</b>	No leadership/ management mix	Limited mix, focus on management, leadership skills lack	Some mix, focus on leadership, management skills lack	Clear mix between leadership and management, not all skills covered are appropriate	There is an appropriate mix of leadership & management skills in the organisation that ensure good functioning
<b>How is the formal and informal leadership recognized within the organization?</b>	Leadership is not recognized. The vision is not clear and leader(s) are not keen to changes	Leadership is recognized but the organization depends on one person (leader) who solely provides the vision	Leadership is recognized, dependent on one person that involves others in visioning	Leadership is recognized and there are more leaders within the organization. Leadership approach is “old school”	Leadership is recognized and shared in the organization. The organization is willing to take risks and try new approaches in order to grow
<b>To what extent the leadership within the organization provides motivation for staff/ members/ volunteers?</b>	No motivation provided by leadership	Some motivation is provided by the leader(s) but the general thinking is that the staff/ members/ volunteers should be motivated just by the cause itself	Some motivation is provided by the leader(s), but not in a coherent/ systematic manner	Motivation is recognized as an integral part of leadership. The leader(s) spend time to motivate others and leading by example. The staff/ members/ volunteers are not encouraged to try new things or give feedback	Leadership delivers consistent, positive motivation to people. The organization is led by “we can do it” approach and failures are accepted as a way of growing. There is a clear approach for new ideas to be introduced and implemented
<b>To what extent the leadership is cultivating new leaders within the organization?</b>	No such culture. Leadership is afraid of new leaders and sees them as potential threat to their position	Cultivating new leaders is not recognized as part of the work of the organization	No systematic approach for leadership cultivation but it happens spontaneously from time to time	Leadership is often cultivating new leaders within the organization. Not all members/ staff/ volunteers are encouraged to become leaders. Leadership is aware of the importance of cultivating new leaders but lacks time/ skills	Leadership is constantly cultivating new leaders within the organization or outside of it. Potential leaders are given support to become future leaders. There are special programs/ activities in place to cultivate new leaders.
<b>To what extent the leadership empowers people to develop personally and professionally?</b>	Leadership does not empower people to develop	Personal and professional development is accessible only to a limited circle of members/ staff/ volunteers	Leadership empowers people to develop, but not in a coherent/ systematic way	Leadership often empowers people to develop but there are no individual plans	Leadership encourages and acts for all people’s development, both personally and professionally. Members/ staff/ volunteers have individual plans for personal and professional development

## 7. Human resource management

	None	Limited	Some	Clear	Comprehensive
<b>Does the organization have recruitment practices?</b>	No practices	Some general understanding on recruitment practices exists, mostly informal	Some guidelines for recruitment exist. Nevertheless they are often not followed in practice	Clear practices/ procedures for recruitment mostly followed with exceptions (for instance headhunting practices and direct contracting)	The organization follows recruitment practices/ procedures for members/ staff/ volunteers. Organization provides real equal opportunities for all
<b>Does the organization have induction practices?</b>	No practices	Some induction is made but mostly informal	The organization has awareness on the importance of induction. The leader(s) welcome new people. There are no clear practices/ procedures	Clear practices/ procedures for induction but no initial training/ meeting are provided. The organization dedicates resources for the induction of new member/ staff/ volunteer	The organization has induction and initial training/ meetings in place for members/ staff/ volunteers. New members also receive a “welcome pack” that includes organization’s vision and mission, organizational chart, principles and ethics, etc.
<b>Does the organization have personal and professional development practices?</b>	No practices	Limited practices for development, mostly done informally	Some guidelines for development followed in the organization but not fully documented (no coherent criteria)	Clear practices/ procedures for development, but no assistance is provided on an ongoing basis	The organization has assistance and personal and professional development practices/ processes in place for members/ staff/ volunteers, based on assessment
<b>Does the organization have assessment practices?</b>	No practices	Limited practices for assessment, mostly done informally	Some guidelines for assessment followed in the organization but not fully documented (no coherent criteria/ description)	Clear practices/ procedures for assessment, but no follow-up is provided	The organization carries out regular assessment for members/ staff/ volunteers and has follow-up methodology to ensure personal/ well-being and professional development of the people
<b>Does the organization have recognition practices (recognize and reward work and behaviours)?</b>	No practices	Limited practices for recognition, mostly done informally	Some guidelines for recognition followed in the organization but not fully documented (no coherent criteria/ description)	Clear practices/ procedures for recognition of work, but no informal input (limited to formal recognition)	The organization fully recognizes the work of members/ staff/ volunteers both formally and informally

## 8. Beneficiary involvement

	None	Limited	Some	Clear	Comprehensive
<b>To what extent the organization plans its activities based on real needs assessment of beneficiaries?</b>	No needs assessment done, the programmes and activities are planned based on assumptions and “gut feelings”	Some assessment is done but not systemized. No plan for beneficiary involvement, feedback based on their initiative	Some practices for needs assessment, but not coherent criteria or methodology/ no constant data gathering	Clear needs assessment is integral part of organizational activities. Nevertheless, activities don't always follow the results. Beneficiaries involved are usually just the ones who are already active in the organization	Needs assessment is an integral part of organizational activities. The organization plans its projects/ programmes based on the results of the assessments. A broad variety of current and potential beneficiaries are involved in the assessment
<b>To what extent the beneficiaries take on various roles in the organization?</b>	No involvement of beneficiaries	Limited involvement, mostly informally/ not structured	Beneficiaries can influence the organization's projects and programme to some extent, mostly on a call to action basis	The organization shapes all activities together with beneficiaries but most of the work is still done by others	The organization actively encourages beneficiaries to take responsibility and independently take on a wide variety of roles in organization. The organization encourages beneficiaries to become members/ staff/ volunteers
<b>To what extent the organization involves beneficiaries in the activities?</b>	The beneficiaries are passive participants of their activities	Limited involvement, mostly informally/ not structured	Beneficiaries are somewhat involved in the activities, mostly at the practical/ logistical level	Beneficiaries are involved in the activities of the organization, but not in all phases	Beneficiaries are involved in all phases of the activities, from identification of needs, defining indicators, design and implementation of activities and follow-up
<b>Does the organization involve new beneficiaries?</b>	No new beneficiaries recruited	Limited involvement of new beneficiaries, not structured/ not intentional	New beneficiaries are recruited, only for specific activities which require more participants	New beneficiaries are recruited, but no practices to welcome them in the organization	Variety of systems in place to actively recruit and involve new beneficiaries as part of the organizational strategy
<b>Does the organization empower beneficiaries?</b>	No involvement of beneficiaries	Limited involvement of beneficiaries, mostly informally/ not structured	Beneficiaries are somewhat empowered to act, but still the organization takes care of all the aspects/ the whole process	Beneficiaries are empowered to act, mostly at a small scale level by small activities	Beneficiaries are empowered to mobilise and advocate on their own behalf, the organization fully provides the tools for them to do it themselves

## 9. Advocacy

	None	Limited	Some	Clear	Comprehensive
<b>To what extent the organization is active in advocacy activities?</b>	Advocacy is not on organization's agenda	Advocacy is on organization's agenda only on ad hoc occasions	Advocacy is on organization's agenda, mostly reacting with no clear agenda	Clear involvement, proactive in following an agenda. However, sometimes the advocacy efforts go beyond the organization's vision and mission	The organisation is proactive in advocacy initiatives in line with its mission
<b>To what extent the organization advocates on behalf of its beneficiaries?</b>	The organization does not involve beneficiaries in their advocacy actions	The organization occasionally consults beneficiaries in their advocacy actions but not in a systematic manner	The organization regularly consults beneficiaries for advocacy actions. The interests of the beneficiaries and those of the organization are not always the same	The organization has a clear system for beneficiary involvement in their advocacy actions but don't always follow their suggestions	The organization's advocacy efforts and messages are consistent and coherent to the best interest of the beneficiaries
<b>To what extent the organization has the skills to advocate on behalf of its beneficiaries?</b>	No advocacy skills in the organization	The organization has some skills, mostly accumulated informally/ not structured	The organization is aware of special skills needed and invests resources. Nevertheless, no person has the capacity to do advocacy	The organization has the basic advocacy skills to work on significant issues. The organization invests some resources in ad-vocacy skills but there is still low specialization	The organization has the skills to work on significant issues, at all levels and in the best interest of its beneficiaries
<b>Does the organization engage the community into advocacy issues?</b>	No engagement of the community	Limited engagement, mostly informally/ not structured	Some engagement, mostly done via other events organized by the organization	Clear engagement of the beneficiaries/ the community into advocacy issues, but no empowerment of the community to act on its behalf	The organization engages and empowers beneficiaries/ the community in advocacy issues that affect people's lives
<b>Does the organization build alliances/ networks/ coalitions for advocacy/ policy work?</b>	No involvement in alliances/ networks/ coalitions	Limited involvement, mostly informally/ not structured	Some involvement, mostly at the invitation of other stakeholders, not proactive	Clear involvement, proactive inside different structures more involved in the subject rather than the advocacy/ policy work	The organization initiates alliances/ networks/ coalitions with other stakeholders for specific and effective advocacy/ policy work

## 10. External communication

	None	Limited	Some	Clear	Comprehensive
<b>Does the organization have a clear identity/ branding?</b>	No identity/ branding	Limited identity/ branding, just a logo	Some identity/ branding, but no clear vision of it/ not everyone in the organization uses it	Clear identity/ branding used by everyone, but it's not the base of all information activities	The organization has a proper identity/ branding that is the base for informing constantly the community on its activities
<b>Does the organization have a coherent communication plan?</b>	No communication plan. The organization acts only on donors' requirements (if the case)	There is no communication plan but an overall agreement on general messages of the organization	Some guidelines for the communication plan. The organization communicates its key messages but has troubles connecting them to individual project goals	Clear communication plan and key messages that are coordinated and correspond one to another. Nevertheless, target groups are not specifically defined	The organization has a proper communication plan that includes consistent key messages, defined target groups and ways to approach them
<b>To what extent does the organization use different communication channels?</b>	The organization is not aware of different communication channels and uses only one source of information sharing (e.g. web page, newsletters)	The organization uses different communication channels (web page, newsletters, FB page) but the information is not adapted to different target groups	The organization is using different communication channels for different news. It adapts the information to specific format. It still relies mostly on its own media (web page, FB, newsletters)	The organization uses variety of different channels and takes into account different publics. It also cooperates with others for communication purposes (platforms, mass media, forums etc.)	The organization selects the most appropriate channels for news they promote. The information is adapted to specific needs and target groups and uses a variety of channels
<b>Does the organization get involved with the mass media?</b>	No involvement with the mass media	Limited involvement with the mass media, not structured, mainly through sending press releases	Some involvement with the mass media, sending clear/ structured information but not constantly (mainly for specific events)	Clear involvement with the mass media, constantly informing them by more than one means, not influencing their agenda	The organization has good partnerships and constant communication with the mass media, influencing their agenda, being a credible source of information
<b>To what extent the organization is transparent and accountable?</b>	The organization has no policy on transparency and accountability	The organization is generally aware of the importance of transparency and accountability but lacks the willingness to actively work on it	The organization is generally aware of the importance of transparency and accountability but provides information only on demand (usually just to donors)	Clear transparency and accountability, not to all stakeholders and mostly through published annual report or other reports. The information might still be accessible only to members, donors, beneficiaries and not to general public	The organization actively promotes transparency and accountability and leads by example. It is proactive in its transparency – publishes information on-line and enables access to all

1. Please centralize the scores from each of the above indicators in this table. Please use one table for each of the persons participating in this evaluation exercise:

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score
<b>Governance</b>	<input type="text"/>					

Justify the score chosen:

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score
<b>Financial aspects</b>	<input type="text"/>					

Justify the score chosen:

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score
<b>Information Management</b>	<input type="text"/>					

Justify the score chosen:

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score
<b>Monitoring and evaluation</b>	<input type="text"/>					

Justify the score chosen:

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score
<b>Organizational structure</b>	<input type="text"/>					

Justify the score chosen:

**Leadership**

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score

Justify the score chosen:

**Human resources management**

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score

Justify the score chosen:

**Beneficiary involvement**

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score

Justify the score chosen:

**Advocacy**

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score

Justify the score chosen:

**External communication**

	Score 1	Score 2	Score 3	Score 4	Score 5	Average Score

Justify the score chosen:

2. Please centralize the scores from each participant in this evaluation exercise, so that you reach an average score for each of the 10 indicators:

Indicator	Person 1	Person 2	Person 3	Person n	Average score
<b>Governance</b>					
<b>Financial aspects</b>					
<b>Information Management</b>					
<b>Monitoring and evaluation</b>					
<b>Organizational structure</b>					
<b>Leadership</b>					
<b>Human resources management</b>					
<b>Beneficiary involvement</b>					
<b>Advocacy</b>					
<b>External communication</b>					

## Action Plan

Following the analysis, verifying the average scores from all the respondents of the self-evaluation matrix, which of the 10 indicators are scored lower?

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Depending on the indicators that are scored lower and correlated with the justifications provided by each person, formulate a short / medium term organizational development objective:

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With reference to the formulated organizational development objective, define some activities that will help to achieve this objective:

Activity	Implementation period	Responsible	Resources

## Organizational development concepts

**Advocacy** - "any attempt to influence the decisions of an institutional elite on behalf of a collective interest" (Jenkins, 1987).

**Beneficiaries** - people who are at the centre of your organization's activity (For example, young people).

**Board** - a group of people responsible for governing an NGO, making sure that the organization pursues its vision and mission.

**Cash flow** - the expected amounts of money entering the organization (revenue) along with what will come out as expenses.

**Donor** – a person, a private organization or a public / governmental institution that provides resources (financial, human, etc.) to an organization.

**Governance** - processes and activities involved in ensuring the efficient and correct functioning of an organization

**Evaluation** - the pursuit of the fulfilment of what the project / activity of an organization aimed at. The main purpose is to help the organization reflect and learn from what it does, observing how far it has come and identifying the modifications / changes needed to implement.

**Fundraising** – the process of finding and securing resources for the organization and for its activities. Usually, this process is viewed especially from the perspective of financial resources, but may include other types of resources, e.g. in kind contributions.

**Information management** - "the process by which an organization creates, captures, acquires, and uses knowledge to support and improve the performance of the organization" (Kinney, 1998).

**Management** – supervising the activities of the organization or projects / programs, guaranteeing their proper performance and respecting the appropriate practices / procedures.

**Monitoring** - collecting and recording information about a project / program / activity of an organization, in order to have an overall and constant view of the activities, to provide regular feedback on how things are going and to help the organization to take decisions.

**Organizational sustainability** – the capacity of an organization to take actions and provide resources for a long period of time, so as to fulfil its mission.

**Vision and mission** - the vision specifies how the organization would like to see the world in which it operates. The mission defines the fundamental purpose of an organization - why it exists, for whom and what it does to reach the vision.

**Risk management** – the process of identifying risks (probable events that may occur and their consequences) and how to plan and take action to prevent or reduce them.

**Public Policy** – documents / decision tools of public authorities identifying possible solutions to problems on the public agenda. NGOs can propose amendments to public policies through specific analyses (policy briefs).

**Stakeholders** - any group or person within or outside an organization that has a direct or indirect interest (stake) in relation to the organization.

**Strategic planning** - a process by which an organization coherently implements its mission, taking into account the local context, its strengths and weaknesses, the threats and opportunities it faces.

**Strategy** - an action plan designed to achieve the long-term purpose / goals of the organization. The strategy usually involves setting goals / purpose, planning actions and mobilizing resources to implement actions.

**Transparency** - "to exchange information and act in an open manner. It allows stakeholders to gather information that could be essential to defending their interests" (United Nations Development Program, 1997).