**Organizational Capacity Analysis Process**

**Flowchart of the process**

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| 1. **Pre OCAT-Administration** |
| 30 days before:  Introduce the concept of OCAT:   * Explain them individually. * If there is an opportunity of informing during “Community of Practice” meeting, then utilize that.   Note: Please make sure your talking points ready before introducing OCAT. |
| 25 days before   * Send the cover letter after your review, make local customization if needed (in case any changes are made then please run this through with “Opportunity Hub” Team for their final review)   Reference: OCAT Sample Cover Letter |
| 20 days before:  Discuss with organization head on planning/preparation and explain again the purpose and expected output of the process. |
| 15 days before:   * Share the Pre-Site Visit Reflection and Document Checklist to partner. This document should be shared with all participants who are part of the OCAT discussion. * Receive the Due Diligence, Safeguarding and other relevant documents from different departments of FF. |
| 7 days before:   * Pre-Site Visit Reflection and Document Checklist should be received back to FF team for their own review. * Get the list of participants from organizations along with their names, designation, and department. * Share the OCAT Tool document to all participating staffs for preparing their thoughts. You can also ask partners to decide holding a meeting to discuss the tool |
| 3 days before:   * Review of DD, safeguarding and other relevant documents and prepare findings and keep ready to discuss during OCAT administration process. * Complete the informal pre-visit analysis of the organization based on the existing knowledge and review of the reflection document filled by partner in OCAT Pre-site Visit Facilitator Reflection Document. * Arrange a note-taker to accompany on site-visit. The note-taker can be someone outside of the organization who is familiar with program or a staff member of the organization. |

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| **B. During OCAT Administration** |
| **Before beginning on the day:**  Define different dimensions of the meeting:   * Purpose of the meeting * Overview of the process * Duration of the process * Description of each step of Organization Capacity Assessment Process   Note: it is advisable to prepare a note well in advance for covering above points.  The facilitator can adapt the process during the on-site visit based on the specific circumstances. For example, they may choose to conduct individual meetings or group discussions, depending on the topic being discussed. For instance, during discussions on leadership, the facilitator may request that leaders step out to encourage open and uninhibited participation from other staff members. |
| **Working on Dimension:**   * Review the pertinent documents and pre-visit reflection document for each dimension, identifying capacity building needs within each. * Thoroughly discuss the provided standards and guiding principles, utilizing them as a facilitation guide. * Collaboratively complete the reflection and scoring process with participants after each dimension discussion.   The overall discussion is expected to take approximately 6 to 7 hours.  Note: Prior to commencing the facilitation, please ensure that all relevant documents, particularly those specified in the policy sections, are obtained well in advance. |
| **In the last hour of the session:**   * Reflection: Review and score the reflection points for each dimension, ensuring that any capacity building areas not covered are identified and included within the respective dimension. * Prioritization: Identify key gaps and areas for improvement, taking into consideration any areas that may not have been covered in the OCAT. * Action: Collaboratively develop a list of capacity building actions, outlining the technical and financial support required.   Note: It is important to note that the capacity building action list is not the final version and will need to be reviewed by the board, leaders, and participants at a later stage.  Note: Please use the Capacity Building Plan Template for preparation of plan. |
| **By the end of the day:**  Following should be achieved:   * The OCAT tool should be completed by the facilitators with the consent of the participants. * All participants should feel comfortable with the reflections and scores for each dimension. * A draft list of prioritized action plans should be developed, including an agreed timeframe and the necessary resources (financial and technical) required for implementation. * All relevant documents should be filled out and agreed upon by the participants. |

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| **C. Post OCAT Administration** |
| **Within 15 days:**   * A final review of the OCAT tool and prepare final notes based on the visit. * Share the complete tool with partners, the FF line manager, and the Opportunity Hub team for reference. * Identify any red flags or concerns that were observed during the OCAT process within the FF team. |
| **Within 15 to 30 days:**   * Schedule a follow-up meeting, either through a phone call or an on-site visit, to discuss and determine a list of actions, funding requirements, execution plan, and support needed. * Share the final capacity building plan with the Opportunity Hub Team. Please utilize the provided Capacity Building Plan template.   Note: Please use the Capacity Building Plan template. |
| **Follow up of OCAT- Every 9 Months (Twice in 18 months):**   * During monitoring visits, informally assess the progress made on the capacity building plan. * Conduct a formal review with partners to evaluate the progress on the capacity building plan after 9 months from the completion of the first OCAT. * Share a Progress Report-Capacity Building Plan Template with the Opportunity Hub Team |
| **Next Steps:**   * Repeat the Organizational Capacity Analysis process every 18 months. * Initiate discussions with the Opportunity Hub team two months in advance. * Conduct a joint evaluation of the progress made on the capacity building plan. * Partners should self-evaluate their progress using the Partner's Reflection Form. * Partners are required to fill out and share the Partner's Reflection Form with the FF team for reference. * Share the OCAT Partner Reflections form and the OCAT Program Advisor Evaluation form with the line manager and Opportunity Hub team. * Follow the same process as outlined in the OCAT Pre-During and Post boxes.   Note***: please don’t share the OCAT PA Program Advisor Evaluation Form with partners.*** |

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