



SVP Capacity Assessment Tool

Overview, Benefit and Steps

Definition of Organizational Capacity Building

The development of core skills, management practices, strategies, and systems to enhance an organization's effectiveness, sustainability and ability to fulfill its mission.

- Financial Management
- Fund Development
- Information Technology
- Marketing & Communications
- Program Design & Evaluation
- Human Resources
- Mission, Vision, Strategy & Planning
- Legal Affairs
- Leadership Development
- Board Governance



Why Capacity Building is Important

Well-managed nonprofits with strong internal systems are more likely to achieve greater impact because they can:

- be financially stable
- retain key staff
- have strong external leadership of the organization
- have capable, engaged board members who carry out their fiduciary role
- be adaptive to changes in the landscape, funding climate or sector
- have a culture of reflection and planning
- be committed to results because they have the evaluation capacity to monitor performance



The SVP Capacity Assessment Tool

- A self-assessment instrument that helps nonprofits identify capacity strengths and challenges and establish capacity building goals.
 - Primarily a diagnostic and learning tool.
 - Provides a useful framework for measuring growth in organizational capacity over time.
 - Serves as a baseline for current skills and knowledge and helps set priorities for improvement projects.
 - Jointly developed by McKinsey & Co. and SVP; adopted by several SVP affiliates.
- Results from the Assessment will guide the development of the annual work plan and help identify the areas where SVP's resources can be directed in support of capacity building.



What the tool is...

- A software tool with ten assessment areas and 71 total questions organized by areas of organizational capacity, such as Mission, Human Resources, Leadership, Financial Management, IT, etc.
- A mechanism whereby your ED, a couple of board members, and a couple of executive staff members honestly assess your organization's strengths and challenges by scoring and establishing priorities for each focus area.
 - Goal is consensus on organization's needs; no right/wrong answers.
 - Investee participants score each area independently in advance.
 - SVPP ED and Lead Partner will facilitate a meeting with Investee participants to agree on composite score for each assessment area.
 - Next step is to define projects that relate to the Investee's priorities on capacity building.
- An opportunity for SVP to better understand your organization and where we can help.



And what it is not...

- It is not SVPP's way to tell you what you should or must work on: you decide where and what your priorities are.
- It is not a measurement device but rather an indicator of where focus and resources may be needed.
- Capacity assessment scores will not be taken into consideration for grant renewals, only for capacity building focus.



Getting Started

- Investee Organization Responsibilities
 - Identify participants – Executive Director, 2-3 senior staff and 2 Board members
 - Send participant information to SVPP’s Mark Holloway (mark@svppportland.org)
 - Schedule meeting with all participants (approximately two-three weeks after tool is sent to participants)
 - Participants complete assessment individually (takes approximately one hour)
 - Participants attend discussion to consolidate responses and agree on priorities for capacity building
 - Work with SVPP Lead Partner to develop plan for capacity building
- SVPP Responsibilities
 - Provide Background information for Capacity Self-Assessment Tool
 - Send tool to participants
 - Collect completed assessments and aggregate data
 - Facilitate Investee discussion among participants to consolidate responses and agree on priorities for capacity building
 - Help develop annual objectives for capacity building with Investee (Lead Partner)

