

This tool is published by INTRAC in conjunction with the [Partner Capacity Strengthening toolkit for small charities](http://www.intrac.org/ba-pcs-toolkit)authored by Catherine Squire – part of a collection of [five toolkits](http://www.intrac.org/ba-toolkits) produced as part of the [*Strengthening Small Organisations with Big Ambitions*](https://www.intrac.org/projects/strengthening-small-organisations-with-big-ambitions/)programme (2021-2022). This programme was funded by the UK Foreign, Commonwealth & Development Office (FCDO) through a Small Charities Challenge Fund (SCCF) Capacity Development Grant.

# **PCS tool – SAMPLE Organisational assessment process**

This sample organisational assessment process is released with the Partner Capacity Strengthening Toolkit for Small Organisations with Big Ambitions. Please refer to the toolkit for further guidance on this activity. You can edit this file to adapt it to your and your partner(s) needs. In fact you **should** adapt to your needs! This is not a blueprint and each step is a choice you and your partners make.

1. *Discuss the purpose of the organisational assessment for the partner organisation / community-based organisation*
2. *Review the chosen tool with a core team in the partner organisation to build understanding and ownership*
3. *Adapt to your context, area of work (e.g. working with street children needs strong safeguarding procedures) and type of organisation (e.g. a membership organisation will need good procedures for involving members) if necessary*
4. *Core team / Lead person in their organisation decides on process and sets up workshop plan*
5. *Give out the tool to a range (or all) staff and key volunteers in different roles to score individually. Trustees can also be involved.*
6. *Come together for a day to discuss and agree scores as a group (the discussion is as important as the scores!), or discuss in smaller teams first*
7. *Prioritise areas for development*
8. *Draw up a strengthening plan starting with what the organisation can do themselves and with peers.*