YES YOU CAN!

THE PDO'S GUIDE TO CAPACITY SELF-ASSESSMENT & CAPACITY DEVELOPMENT ACTION PLANNING

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Preface

Welcome to this guide! You are probably reading this because your Planning and Development Office (PDO) is ready to embark on its own capacity development journey. Yes, "embark" is the right word, because this is not a guide for implementation. It does provide direction for the first two crucial strides in the capacity development process (see p.11): capacity self-assessment (Part 1 of this guide) and capacity development action planning (Part 2).

Using this guide provides a PDO with a sound basis for dialogue with Provincial superiors, donors, etc. about the priorities for the PDO's capacity development and the roles that these other actors can play in the process.

Regardless of whether your PDO is an emerging entity, a well-established structure with several dozen collaborators and a variety of responsibilities or whether you are facing the challenge of self-renewal and adaptation to changing stakeholder needs and demands …. it is always useful to take the time to reflect, to affirm what is good and positive, to identify areas needing improvement and to plan those activities that should bring about the desired improvement. By doing so, PDOs can develop their capacity in a focused, deliberate manner.

We, at VIA Don Bosco, believe that capacity development is very important for PDOs. Why? For two reasons:

Firstly, PDOs make a major contribution towards the self-sustainability of the SDB / FMA Provinces. The importance that the PDO has for the Provinces of the Salesians of Don Bosco (SDB) and the *Figlie di Maria Ausiliatrice* (FMA) is increasingly recognized. In SDB circles, f.ex., the 2005 Rome Seminar and the 2011 Hyderabad Seminar gave a tremendous boost to reflection on the role and function of the PDO, its "place" within the Province and the world, and its relationship to other sectors such as Youth Ministry, Social Communications, etc.

Secondly, PDOs are our direct partner organizations in the SDB and FMA Provinces that we collaborate with on development programs and projects. To us, contributing to the capacity development of these PDOs is inherent to the type of partnership that we want to maintain.

We also believe that PDOs that take their own capacity development seriously can enhance their performance as well as increase their resilience. We hope this guide will stimulate PDOs to take good care of themselves and leap ahead.

For many PDOs, using this guide may be the first time to start working on capacity development in a focused, deliberate manner. Most likely, it will not always be easy to answer all the questions that are raised. In some cases, the answers may simply be a "best guess" at this point in time. Feel free to let us know what your difficulties are in working with this guide. Your feedback will definitely contribute to its improvement.

Experience has taught us that while PDOs across the world share a certain number of characteristics, there are also significant differences among the existing offices. The guide may not be equally relevant for every situation. We encourage PDOs to adapt it according to their individual needs. If your PDO decides to make changes, please let us know. We are happy to learn from you!

One last thing—if you need an explanation about any of the words and phrases in the guide, or just if you're interested: there's a glossary in the back that provides you with the most important definitions.

Capacity development … How to embark on this journey? What to do?

Here is a brief overview of how the guide is organized and of which steps it helps you take.

1. Part one: capacity self-assessment

The capacity self-assessment is organized around five modules. These modules are based on a model of capacity developed by the European Centre for Development Policy Management (ECDPM)—the so-called 5CC model (see p.12). According to the 5CC model, capacity is the balance and synergy between five interlinked core capabilities (5CC). Each module invites the PDO to self-assess one aspect of its capacity, that is, one core capability.

Step 1   **APPETIZER**   The appetizer is a warm-up. It helps you think about the core capability of the PDO you are about to assess.

Step 2   **INDIVIDUAL REFLECTION**   With the help of a questionnaire and a personal score sheet you arrive at a score for each of the building blocks that make up a particular core capability. It is important that you justify the score that you give.

Step 3   **GROUP REFLECTION**   Per core capability, the total group score for each building block is calculated. More importantly, through group discussion the participants reach agreement on two or three areas for improvement per building block. This is noted down in the summary score sheets.

Step 4   **SYNTHESIS**   The participants copy and paste the scores and areas for improvement listed in the five summary score sheets into the overall score sheet. This overview helps to identify what the PDO's priority areas for future capacity development efforts are. It also helps to detect overlap and / or repetition of areas for improvement. Make sure all the participants have a copy of this … it will help you monitor whether, over time, there is actually improvement in those areas that you identified.

2. Part two: capacity development planning

The PDO can now move to capacity development action planning. The results of the capacity self-assessment form the basis for the following three steps.

Step 5   **PRIORITIZING**   Using the synthesis, the participants identify those areas for improvement that will be addressed through concrete action. Priorities for action are based on the importance, impact and feasibility of working on a particular area for improvement.

Step 6   **CONSIDERING STRATEGIES**   There are many different strategies that the PDO could use to develop its capacity. Before actually drawing up a capacity development action plan, it is a good idea to consider the different options and select the most appropriate ones. Attention should also be paid to whether or not the conditions exist to ensure that the results from capacity development efforts are sustainable.

Step 7   **OPERATIONAL PLANNING**   The participants identify actions and set a plan to address the areas they have prioritized. They establish who will take responsibility for the various actions; what the timeframe is; which resources are necessary.

3. The importance of a good facilitator

To work through these seven steps, we recommend you use a good facilitator, who can use the guide in a way that is helpful to the PDO and also manage the group discussions. Ultimately, the success of the capacity self-assessment and the capacity development planning exercise depends more on the quality of the facilitation and group discussions, than on the quality of this guide. This has much to do with the nature of capacity development itself.

Capacity development is a complex human process based on values, emotions and beliefs. It involves changes in relationships between different actors and shifts in power and identity. A facilitator who stays in touch with the mood of the group will know what to do at the right time to guide you through the different steps described in this guide.

Ideally, the facilitator gets familiar with the format of the guide and meets with PDO leadership and staff beforehand in order to come to an agreement on the process (timing of the different steps, expectations towards participants, arrangements for note taking, etc.). It is important that the PDO leadership and staff are supportive of the process and its outcomes. A good facilitator will help to ensure that this "buy-in" actually happens. S/he will help the group stay energetic and engaged, as well as counter some of the risks involved in capacity self-assessment.

Here is a brief description of the role of the facilitator:

Risks	Abilities of a facilitator
The assessment process raises expectations of staff members. They want to see all the changes happen in the shortest possible time.	Ability to help staff and stakeholders identify their priorities and manage expectations in line with the capacity of the organization.
Staff and stakeholders are afraid of voicing their concerns in case they are viewed negatively by other members of staff and the leadership.	Ability to create an atmosphere of trust and openness to share for both staff and the leadership of the organisation.
The assessment uncovers tensions that have never been fully resolved.	Ability to creatively manage tension and conflict.
Some members of staff feel vulnerable as areas of their work become assessed and analyzed.	Ability to create a supportive and affirming environment for staff members to reflect on their own practice and work.
Leadership is worried about how they are perceived by the staff and others.	Ability to create a supportive and affirming environment for the leadership to reflect on their own practice and work.

Source: Tearfund (2003: 14)[1]

Maybe someone in your PDO is widely respected and understands how to work with groups. This person might be a suitable facilitator. Otherwise you could think about using an external facilitator who is recognized for their competence and skills in this area.

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[1] Tearfund (2003). Capacity self-assessment. Roots Resources No. 3. [Online] Available at: http://tilz.tearfund.org/webdocs/Tilz/Roots/English/CASA/CASA_E-%20full%20document.pdf (English) and http://tilz.tearfund.org/webdocs/Tilz/Roots/French/CASA/CASA_F-%20full%20document.pdf (French) (last accessed: January 5, 2012).

Before embarking on this journey … Ask yourself some basic questions

1. Why should we care?

- *Organizational change is inevitable, whether we accept and embrace it or not.*

Social and political changes on the outside trigger changes on the inside; stakeholders' needs and demands change and "force" the PDO to come up with new responses; etc. By embarking on a capacity development process, the PDO can come to "own" and give direction to the change process that it goes through. Ownership reduces the risk of feeling overwhelmed or helpless in the face of external pressures and challenges. It also reduces the risk of stagnation and inertia, and—thus—the risk of becoming obsolete and irrelevant.

- *Your own capacity self-assessment and capacity development planning can also inform the dialogue between the PDO and organizations specialized in supporting capacity development.*

Capacity building is typically understood as a purposeful, external intervention to strengthen capacity over time. In other words, capacity building = supporting capacity development. A range of different players provide such support: donors (incl. some of the Salesian NGO's), academic institutions, individual organizational development (OD) advisers and facilitators, specialized consulting firms, etc. While these outsiders may have a role in supporting the PDO's capacity development process, the ultimate judgment on change, and the relevance of that change, must come from within the PDO. Capacity self-assessment and capacity development planning are means for the PDO to decide priorities and take "the driver's seat" in the change process.

2. Why assess capacity first?

PDOs usually find themselves in action mode. They have a lot of work on their plates and various deadlines to keep in mind. A capacity self-assessment may seem like quite the task. Why not just go ahead with capacity development and send some staff members off for training? Here are seven good reasons.

Capacity self-assessment is necessary to:

- Bring a systematic method to determining capacity needs and assessing existing capacity assets.
- Provide a method for generating quantitative as well as qualitative data to support the formulation of a capacity development action plan.
- Develop a comprehensive view of issues that could be addressed.
- Make sense of complex situations, when it is not always obvious where best to intervene.
- Create a common language of discussion among PDO leadership and staff, and among the PDO and organizations specialized in supporting capacity development.
- Provide a ground for discussion about what is expected of the capacity development efforts that the PDO wants to undertake.
- Increase the PDO's ability to share experiences.[2]

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[2] Based on: UNDP (2009). Capacity development: a UNDP primer. [Online] Available at:
http://www.beta.undp.org/content/dam/aplaws/publication/en/publications/environment-energy/www-ee-

3. When should we start?

- *The moment you start is always the right moment.*

There won't be a magical moment when the stars align and you'll know it's time to start on a capacity development journey. You just need to start. Practically speaking, take the first steps (capacity self-assessment and capacity development planning) at a time when both PDO leadership and staff are available. Including these different perspectives and learning collectively, as a team, is part of the journey.

- *Capacity self-assessment and capacity development planning are not one-off activities.*

They are part of a capacity development process (see p.11). To keep this process on track, it is good to regularly set time aside for a thorough self-assessment. On the basis of the self-assessment, it is possible to plan the capacity development activities that will be carried out or at least started during the year to come. After a year of implementation, it is a good idea to look at the success of the activities that were carried out (what was done exactly? did you achieve the result that you were hoping to obtain through these activities?) and to re-assess the PDO's capacity to help you set the capacity development priorities for the next year.

- *The results of the very first capacity self-assessment count as a baseline assessment for monitoring capacity development over longer stretches of time.*

Experience has taught us that capacity development is a long-term process. Occasional set-backs as well as particularly fruitful years are to be expected. By comparing the results of your capacity self-assessments over time, you gain insight in real, sustainable changes in the capacity of the PDO. Comparison can help you keep better track of where the PDO finds itself in the organizational life cycle (see p.11) and whether the PDO is generally heading in the right direction.

4. How much time should we set aside?

The seven steps take approximately five working days.

5. Who should be involved?

Capacity self-assessment and capacity development planning should prove most useful when they are done in a participatory way—involving both PDO leadership and staff. Stakeholder involvement in the capacity self-assessment is recommended. Try to consult stakeholders who know the PDO quite well; they are able to provide critical insights that insiders may not come up with.

Ideally, the entire PDO leadership and staff should be available to participate in the different steps described in this guide. In this way, it is easier to ensure broad ownership over the changes that follow from the capacity self-assessment and, ultimately, from the capacity development activities that are undertaken.

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library/climate-change/capacity-development-a-undp-primer/CDG_A%20UNDP%20Primer.pdf (last accessed: January 5, 2012).

However, this may not always be possible. For example, PDOs with a large number of staff members may find whole group discussions too time consuming or difficult to facilitate. Small PDOs may find it a challenge to combine capacity self-assessment and capacity development planning with their usual workload (administrative work, field visits, etc.). Because of workload, it may also be difficult to coordinate personal agendas and get the same people to participate throughout all stages. If the PDO has "antennas" that are located in different cities or countries, it may be quite costly to get everyone together.

To deal with these challenges, try the following: plan the steps in advance (set dates for group discussions etc.) so that everyone has time to organize his / her personal agenda accordingly; get at least a representative core group together (these people will be involved throughout the different stages); make someone responsible for note taking and internal communication so that those who cannot be physically present have the chance to read up on progress and provide written feedback if they wish (note: this person cannot be the facilitator at the same time). In the case of decentralized PDOs, we recommend that staff in the antennas are also involved as much as possible.

Participation doesn't necessarily mean having everyone in the same room together at the same time. Often people need a safe place to express their ideas and feelings. Sometimes it may be better initially to speak to people individually or in peer groups. For example, when everyone is together, it may be difficult for PDO leadership and staff to openly discuss all issues that come up during a capacity self-assessment. The facilitator should help the PDO decide on the best approach, keeping in mind that the purpose is to build consensus and "buy-in" at all levels.

It is very important to get an "OK" from PDO leadership on priorities for capacity development and on the concrete capacity development efforts to be undertaken (because these may have cost implications).

6. Where should we meet?

- ***Find a venue that is away from the PDO office.***

F.ex., a conference room at or near the Provincial House; a meeting room. That way, the risk of getting distracted by the regular workload is diminished. Make sure the room is big enough to have whole and small group discussions and to give all the participants enough space and quiet for individual reflection.

Getting ready … Fill your backpack with some basic concepts

1. Capacity development and the lifecycle of an organization[3]

Organizations have a lifecycle, just as living organisms do. If you want to identify the phase of organizational growth that your PDO is currently in, you could use the following model:

Figure 1: Lifecycle of an organization
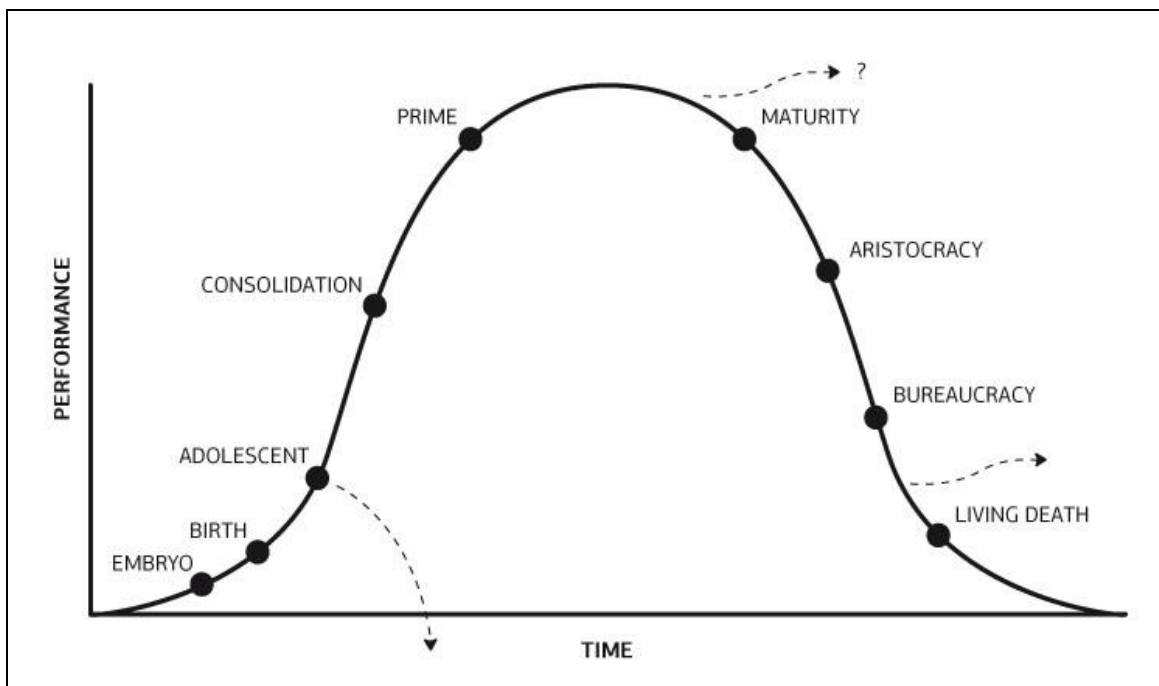
The model basically reflects the human lifecycle. The two axes suggest that over time, an organization's performance increases, but will eventually decline.

- **Embryo:**   Many organizations start with a dream, an idea—f.ex., the Provincial and his / her Council decide it is necessary to create a PDO to help improve the Province's self-sustainability. This is not yet an organization and the dream will require a lot of nurturing to make it to the next stage.

- **Birth and infancy:**   The PDO is born: only very basic policies or systems are in place. The people involved with it do everything themselves. They are often opportunity-driven and vulnerable to changes in the external environment. As the PDO becomes known, more opportunities present themselves. This may lead to the organization doing too many and too diverse a range of initiatives. They need to learn to prioritize.

Likely capacity assets: energy, motivation, innovation, strong collective responsibility
Likely capacity needs: focus / balance, visioning and missioning, more human resources

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[3] Mostly taken from: Lipson, B. & Hunt, M. (2008). *Capacity building framework: a values-based programming guide.* Oxford, UK: INTRAC.

- **Adolescent:**   As the PDO expands and becomes more successful, it inevitably experiences "growing pains". New staff have to be recruited and new systems developed. It becomes less and less feasible for the founders to control every aspect of the PDO. If (some) founders are unwilling to let go, this may result in a crisis that could tear the PDO apart.

Likely capacity assets: staff that are skilled in the core functions of the PDO , clarity of and commitment to vision and mission, non-bureaucratic
Likely capacity needs: standardized administration systems, depersonalized leadership, coordination and team building

- **Consolidation:**   If the PDO comes through this crisis, it often devotes resources to establishing a sound management and administrative base.

Likely capacity assets: capable and committed leadership and staff
Likely capacity needs: long-term strategic planning, financial management systems, more support staff

- **Prime:**   The PDO finds itself in its most effective period.

Likely capacity assets: strong strategic approach, clear goals, well-established support systems, capable and committed leadership and staff
Likely capacity needs: outward-orientation / networking

- **Maturity:**   Effectiveness is still there but the commitment to the vision might start to weaken. The organizational culture may be less inventory and become risk averse.

Likely capacity assets: capable leadership and staff, well-functioning management and support systems
Likely capacity needs: self-renewal, re-engagement with vision, learning from stakeholders, more eye for context

- **Aristocracy**   The decline begins. The efficiency will still be there and the PDO will probably keep its good reputation over time. But it will gradually lose contact with reality. Serious problems occur but these will be ignored or hidden. These underlying problems will have to be dealt with.

Likely capacity assets: capable staff, well-functioning management and support systems
Likely capacity needs: enthusiasm, creativity, (re-)visioning and missioning, adjustment to evolutions in context

- **Bureaucracy**   Emphasis is on forms, procedures and paperwork; lack of vision; programs are secondary. Any revival has to be traumatic and radical surgery is needed; otherwise …

- **Living death**   The PDO will lose the confidence of its stakeholders, incl. donors, and will die. Although some bureaucracies never get there, they just go on and on …

For organizations, this lifecycle can manifest itself in the rise and fall of performance. However, unlike the natural lifecycle in humans, organizations can rejuvenate or reinvent themselves. Their survival, in fact, depends on their capability to change, to learn from experience and to adapt to their environment.
If this change process is handled in a deliberate and purposeful manner, then we can call it a capacity development process.

The different stages of organizational maturity help us understand where an organization is and hold realistic expectations about achievable changes. It may not be realistic to expect that a simple capacity development effort will enable huge leaps forward, but it may help a PDO move to the next level of development.

The model above also illustrates that organizations best start a new lifecycle while they are still on the upward curve. Although it may be hard to mobilize the necessary energy to invest in capacity development while the organization appears to be doing well, the actual capacity development effort that is necessary to keep an organization "on track"—or rather: to get it *back* "on track"—becomes much greater once decline has set in. This is precisely why it is best to permanently invest in capacity development … even if heavy investment is not always feasible, it is also not always necessary (only when you wait too long!).

2. What is capacity development?

There is no generally-accepted definition of capacity development, but here is one that VIA Don Bosco likes to use:

> *Capacity development can be seen as a (…) deliberate process whereby people, organizations or society as a whole create, strengthen and maintain capacity over time.*[4]

Capacity development is basically an internal process that involves the main actors of the PDO taking primary responsibility for the change processes that their organization goes through.

- *Capacity development is a deliberate process*

Organizations *intentionally* engage in capacity development.

- *Capacity development is a purposeful process*

Organizations engage in capacity development for a reason, namely because they want to improve their performance. They want to improve the outputs and results that they deliver and enhance the impact they have.

- *But … it is also an uncertain process*

Capacity development takes place within a larger, changing (political, social and institutional) context: all sorts of external factors influence the organization's capacity as well as its ability to develop its capacity. These influences can be positive or negative. The context is also an important factor in determining which aspects of capacity development should be prioritized.

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[4] Simister, N. & Smith, R. (2010). Monitoring and evaluating capacity building: Is it really that difficult? INTRAC Praxis Paper 23. [Online] Available at: http://www.intrac.org/data/files/resources/677/Praxis-Paper-23-Monitoring-and-Evaluating-Capacity-Building-is-it-really-that-difficult.pdf (last accessed: January 3, 2012).

What is more, all sorts of external factors also influence the results and impact that an organization can show for. So it is difficult to be certain that better results or greater impact are actually due to the capacity development efforts that were made. On the other hand, this uncertainty also implies that if better results or greater impact remain elusive, it does not necessarily mean that capacity development failed.

- ***Capacity development is a process of deep learning***

Like most organizations, PDOs learn from experience. In fact, most organizational change probably takes place by learning from experience. It is a natural change process, something that happens on an everyday basis. Capacity development is about improving the way your PDO learns. It is about *deep* learning.

For deep learning to take place, you first need to pause a while, stepping back to think about where you are now, and why … what is your experience? What is your existing capacity? What are the relevant factors that enable you to achieve your goals? What capacity would enable you to move forward and increase the quality of your performance in the direction of your goals?

Part 1 of this guide—dedicated to capacity self-assessment—helps the PDO in this reflection. It includes instruments for individual as well as collective reflection. The most solid foundations for action come from thinking and learning together, from people working together with their own real experience.

Action needs to be "towards something". It needs direction. If a PDO wants to strengthen the capacity it has, it is because it has a mission and vision to realize, because there are certain goals it wants to obtain and because it wants to be well equipped to do so. So an important part of the capacity development process is to remind yourself of where you want to be. Reflecting on where you want to be, allows you to set priorities for action.

Part 2 of this guide—dedicated capacity action planning—helps you to do so. It provides you with instruments to formulate and budget a capacity development plan.

Figure 2: Capacity development process
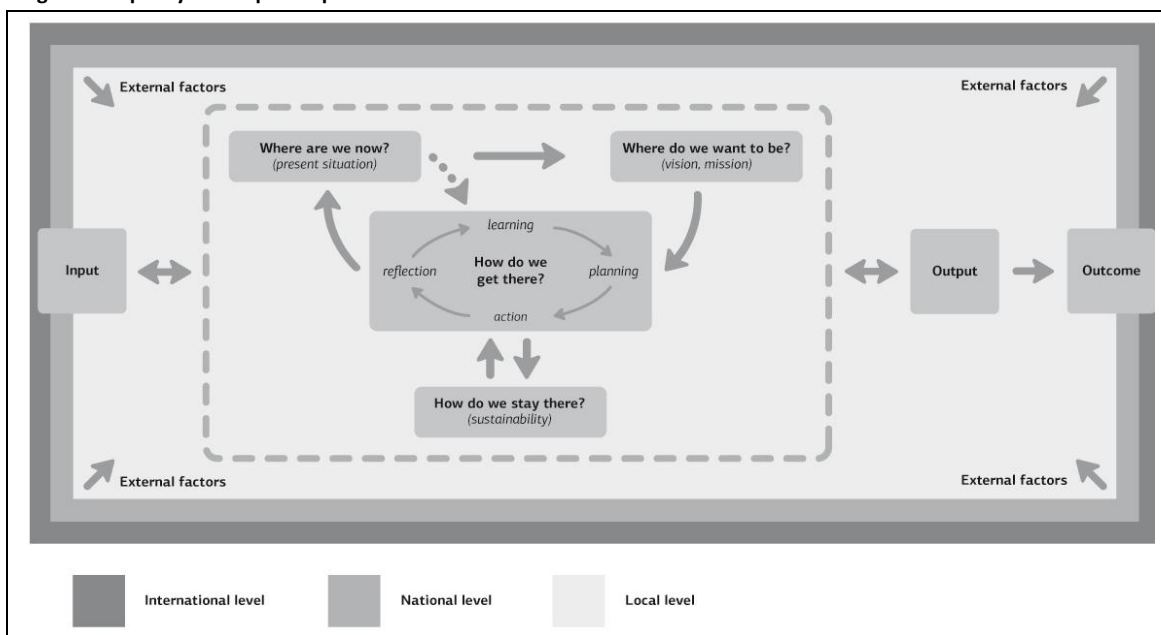
The implementation phase is where the real action occurs. During this phase, the PDO carries out specific activities to develop its capacity. The capacity development plan that was formulated helps you keep on track. The point is not to rush from action to action, though. Sure, there's a certain satisfaction in "getting things done". A lot of satisfaction, even. But during implementation, too, deep learning is very important. Besides implementing all the capacity development activities that you planned for, pursuing a reflective, action learning approach is in and of itself a way to strengthen organizational capacity. Deep action learning helps you get more out of all of your experiences.

If you use it to learn from the capacity development efforts that you undertake, it is a way to come to grips with the organizational change that capacity development is all about. It helps you understand and guide the change process and helps the people working in the PDO "stay together" as a team. The Barefoot Collective developed a great (free!) guide that tells you everything about action learning, and another one (also free!) with lots of ideas on how to design and facilitate creative learning activities.[5]

3. What is capacity?

This guide uses a broad definition of "capacity" that was originally developed by the European Centre for Development Policy Management (ECDPM). One of the major advantages that this definition has vis-à-vis other definitions, is that it expands the focus of capacity to "soft skills". Capacity is not just a technical matter. As one PDO representative put it: "To have a well-functioning PDO, we need a big Salesian heart."

Intuitively, we probably all know that that's true. But still, when you check existing instruments for organizational self-assessment, you quickly notice that many of them focus only on technical or functional capacity—things like institutional arrangements (mandate, organigram, etc.), management capacity (human resource management, financial management, etc.) or infrastructure and equipment. Of course, these things are important for a PDO. But they are not the be all and end all of its capacity.

The model developed by ECDPM is called the 5CCs. The 5CCs refer to five core capabilities, which to the degree that they are developed and integrated successfully, ensure overall capacity. All five are necessary, yet none are sufficient by themselves.

Figure 3: Capacity flower
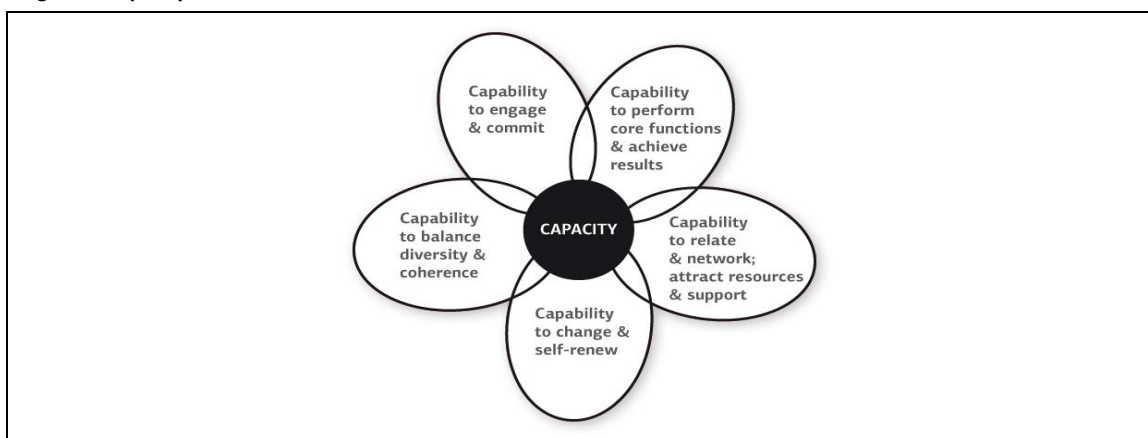
This probably sounds and looks a little bit abstract. Still, the model is very much based in people's actual experience. ECDPM identified these five core capabilities through 16 case studies, of organizations in a variety of sectors, circumstances and geographic settings. These case studies involved interviews with people working for these organizations as well as with stakeholders. From the experiences recorded, ECDPM was able to distill the 5CCs. If you would like to read the whole study, you can find the reference in the footnotes.[6]

4. What are the five core capabilities?

Core Capability 1: the capability to engage and commit

CC1 refers to the idea that an organization must have the will and the drive to choose, to empower and to create space for itself. This is about the capability of an organization, as a living system, to be conscious and aware of its place in the world, to develop its own motivation and commitment, and then to act. This has a lot to do with attitude and self-perception.

More specifically, this capability is about human, social, organizational and institutional energy. This means that an organization must have the capability to organize itself and to motivate and engage its staff to work energetically toward common goals. Staff needs to be aware of its legitimacy, keep a clear focus and have confidence to address challenges.

Core Capability 2: capability to perform the core functions (tasks) of the organization and to achieve results

CC2 describes the knowledge, expertise and experience required to carry out actions and achieve the results aimed for. This includes technical and logistical skills, but also managerial capacity.

The concrete interpretation of CC2 depends on the role and core function (tasks) that the PDO actually has and those that it could aspire to. Experience tells us, that the PDO's role and function vary across Provinces and vary in time. There are some basic tasks that all PDOs have in common, but hopefully PDOs manage to grow beyond these basics.

Core Capability 3: capability to relate and network with other organizations; to attract resources and support

CC3 refers to the fact that an organization does not stand on its own. It must be able to analyze and understand its own environment and initiate, manage and maintain key relationships with other organizations and individuals in order to attract support and resources for its continued existence.

This capability is thus about the ability to earn credibility and legitimacy, to buffer the organization from intrusions and to earn the trust of others. Through building coalitions and alliances, one's position can be consolidated and effectiveness can be enhanced.

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[6] Baser, H. & Morgan, P. (2008). Capacity, change and performance. ECDPM Discussion Paper 59B. [Online] Available at: http://www.ecdpm.org/Web_ECDPM/Web/Content/Download.nsf/0/0BA74077B6E93908C12578E2003F98E1/$FILE/08-59B_Baser_Morgan.pdf (last accessed: January 5, 2012).

On the other hand, organizations frequently have to compete for power, space, support and resources with a variety of other actors. CC3 therefore also describes an organization's ability to influence its stakeholders and environment through negotiation and advocacy.

Core Capability 4: capability to adapt and self-renew

A PDO that is not able to change as the context and times change, will die—it will become stagnant, overly bureaucratic, etc. and lose its relevance and its support.

CC4 refers to the capability to learn continuously, to take on new roles and to handle change. CC4 is not only a key requisite for organizational survival, it is also central to an organization's ability to continue to be relevant, effective and efficient within a changing environment and towards changing needs. Capacity from this perspective is also about the ability of an organization to cope with shocks—f.ex., unforeseen government or funder decisions, natural disasters, loss of key staff, etc.

Dealing with change requires qualities, such as resourcefulness, innovation and initiative, the courage to experiment without undue fear, etc. An adaptive leadership culture can facilitate these qualities by providing opportunities to learn and creating confidence to change.

Core Capability 5: capability to balance coherence and diversity and to encourage both stability and innovation

CC5 refers to the ability to find effective linkages between different organizational objectives and stakeholder interests.

An organization needs diversity: a broad variety of skills / competencies; a variety of perspectives and ways of thinking among its members and divisions (teams, departments, …). Diversity is a prerequisite for continuous renewal and innovation. This way, it can develop resilience and the flexibility to react adequately to different situations. At the same time, an organization needs to prevent fragmentation so as not to lose focus. It is important to stay true to your core values, identity, and good practices.

The mix of competencies among staff needs to be kept in balance—f.ex., balance between "hard" or technical skills and "soft" skills, etc. The capability to achieve coherence often also concerns a balancing act between centralized control and decentralization—f.ex., in the case of PDO's with a central office and "antennas"; in the relationship between PDO and local centers; etc.

Still too abstract?

Don't worry! In Part 1 of this guide, each of the 5CCs is further broken down into more concrete building blocks. For each building block, we formulated a number of questions to help you reflect on what that building block could mean in your everyday practice. Some of these questions will probably immediately ring a bell … when they speak to something that is truly your experience. Some questions may not really speak to you … maybe because they are less relevant in your context or from your perspective, or at this point in time. That's OK too. Just focus on those issues that really matter to you! They say something

important about some aspect of the capacity of your PDO. And when it comes to setting priorities for capacity development, it's always best to focus on what's important.

PART ONE:
CAPACITY SELF-ASSESSMENT

Capacity self-assessment ... How does it work?

1. What can you expect?

The capacity self-assessment contains five modules and a synthesis tool. Each module helps you to assess one core capability (CC) or aspect of the PDO's overall capacity. Because capacity is integral, we advise the PDO to always go through all the modules. Looking at just one or two core capabilities would not lead to the best prioritization of capacity development activities afterwards.

Each module consists of the following elements: an appetizer (step one); a questionnaire (step two) and a personal score sheet (step two) and a summary score sheet (step three). After the five modules, there is an overall score sheet to help you synthesize how the PDO is doing on the 5 CCs.

- *Appetizer (= step 1)*

The appetizers help you get ready to assess a particular core capability. If there is not enough time you can skip them, but if you do use them, then best enjoy them in group. This way you come to a collective understanding of some of the realities that you are about to assess. Ultimately, this can help you save time, because one of the challenges (as well as interesting sides) of capacity self-assessment, is the fact that everyone involved perceives the same situation with very different eyes.

- *Questionnaire (= also called Tool 2A; part of step 2)*

The format of the questionnaire is based on an organizational capacity assessment tool that was developed by the Impact Alliance.[7] You will notice that the questionnaire further subdivides the core capabilities into a number of building blocks. Per building block, there is one main question on which you are invited to score the PDO. This question always begins with "To what extent ...".

To answer the question, there are four paths to choose from, depending on which situation most applies.

	We are not OK. We really need to change things around here.	Score = 1
	We are OK for now ... but maybe we can try a few things.	Score = 2
	We are OK ... but we want to up our game.	Score = 3
	I am not sure ...	Score = 0

These scores are based on a scorecard developed by the Barefoot Collective. They should be interpreted as follows:

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[7] Impact Alliance (2011). Organisational capacity assessment tool. [Online] Available at:
http://host139.hostmonster.com/pipermail/everyone_bcv-cambodia.org/attachments/20110510/ba74e428/attachment-0001.pdf (last accessed: January 5, 2012).

We are not OK. We really need to change things around here.
Score = 1

Your PDO needs a lot of work in this area. Things are more complex than they used to be and you know you need to be not only learning new competencies, but also rethinking the way you work. Every organization finds itself in this situation at one time or another—but don't panic, it's a quite natural state. If you are able to resolve it then it can lay the basis for a very fruitful next stage of development. It might also be that your PDO is moving from one phase in its development to another, needing to transform itself in fundamental ways. If this building block is crucial to your PDO (i.e., if you don't work on this, then you might become quite vulnerable as an organization), then you may need to prepare for a marathon investment in capacity development in this area.

We are okay for now… but maybe we should improve a few things
Score = 2

Your PDO is in reasonably good shape; you are working well in this area. Quite possibly you are learning lots while you work in this area. You and your colleagues do not feel any particular pressure to put special time into developing this building block. So definitely continue working and learning from practice. Still, some aspects of this building block do seem to require your attention. Some unhappiness is mounting, and if these aspects are ignored, they could become a more serious issue in the future. At this point, small-scale, well-targeted capacity development activities can still help you along quite a bit. Act now, to prevent marathon investments later on.

We are okay … and we are aiming for excellence
Score = 3

As a PDO you are in good shape when it comes to this building block. You have moved beyond your pioneering years and have become more organized in this area. Sometimes, building on your existing strengths and capacity assets is more fruitful than trying to compensate what is missing. Your PDO wants to do things better than what is expected of you—faster, more efficient and effective, and even more cheerfully. So get ready to develop this building block in a more conscious, creative and disciplined way. It will generate good energy and help your PDO flourish.

I am not sure …
Score = 0

If you feel none of the above descriptions fit then open up a conversation with your colleagues, asking them where they think the PDO stands in this particular area. If you are not sure about immediately discussing this in group because you are worried that your assessment may not be accepted by the others, then try discussing some of your questions and ideas with one or two people first.

To get a better understanding of each building block, a number of considerations are offered on which to base your assessment. These considerations do not need to be answered one by one, nor are they exhaustive. They are meant to explain the type of issues that are covered by the building block. In your context some may be more relevant than others. Just make use of those considerations that are relevant

to the nature and circumstances of the PDO concerned. Based on your professional knowledge of the context in which the PDO operates you may decide to regard some considerations as more important than others. Feel free to base your assessment also on other issues which you consider more important for the particular building block concerned, in case they are missing in the questionnaire. Your assessment is based on the available information and your professional estimation.

- ***Personal score sheet (= also called Tool 2B; part of step 2)***

The personal score sheet goes hand in hand with the questionnaire. It is on this sheet that you write down your assessment on each building block and clarify the score that you gave. Justify your personal assessment with qualitative illustrations and examples. Focus on the PDO's strengths as well as areas for improvement.

- ***Summary score sheet (= also called Tool 3; step 3)***

For each building block the total score of the group is calculated (total = sum of individual scores). In addition, the purpose is to arrive at two or three areas for improvement that everyone agrees upon and that matter to everyone. This is done through group discussion. Your participation in the group discussion will be more useful if your personal scores are well-illustrated.

Make sure to formulate proposals in a positive way. This way you focus on what can improve, and there is less chance of getting stuck in what you feel goes wrong or not according to expectations. It is easier to find agreement on a positive proposal, than on a negative statement, because negative statements may give people the feeling that they are being blamed for the situation as it is. At this point, it is *not* necessary to formulate *what can be done to actually improve things—just* focus on *what can be improved*.

- ***Overall score sheet (= also called Tool 4; step 4)***

The overall score sheet allows you to make a complete overview or synthesis of the PDO's scores on the 5CCs and of the areas for improvement that you identified as a group. It's easy: just copy and paste from the five summary score sheets.

NOTE ON CONFIDENTIALITY

VIA Don Bosco considers the PDO's self-assessment confidential. We want capacity development action planning to be based on self-assessment, and fund only capacity development activities that are based on thorough self-reflection. However, the scores on the capacity self-assessment are not used as the basis for VIA Don Bosco's funding decisions and PDOs are not required to inform us of these scores. While we do ask PDOs that are seeking funding for capacity development to send us an overview of the areas for improvement that they identified (five summary score sheets), we do not seek insight into the reasons behind them.

Assessing CC1, the capability to engage and commit

Just as a reminder:

CC1 refers to the idea that an organization must have the will and the drive to choose, to empower and to create space for itself. This is about the capability of an organization, as a living system, to be conscious and aware of its place in the world, to develop its own motivation and commitment, and then to act. This has a lot to do with attitude and self-perception.

More specifically, this capability is about human, social, organizational and institutional energy. This means that an organization must have the capability to organize itself and to motivate and engage its staff to work energetically toward common goals. Staff needs to be aware of its legitimacy, keep a clear focus and have confidence to address challenges.

The building blocks of CC1 are:

- Vision, mission and values *(building block 1)*
- Team spirit *(building block 2)*
- Motivating staff *(building block 3)*
- Clarity of role and purpose *(building block 4)*
- Recognition from outside *(building block 5)*

	MODULE 1: Capacity Self-Assessment CC1

Step 1: Appetizer—Reflecting on motivation

Every organization needs energy, "drive" and motivation to function. Think of the battery that provides the PDO with this drive: Is your PDO's battery fully charged? Half charged? Almost empty?

Choose the battery that best represents the level of "energy" and "drive" of your PDO. Discuss the reasons and factors that create this level of "energy". Think of factors that cause a feeling of "flow" or—inversely—of "stuckness".

Step 2: Individual reflection

Tool 2A: Questionnaire on Core Capability 1 (CC1)

Instructions:

- This questionnaire goes hand in hand with the personal score sheet on p.24. There is one main question per building block—which is the one that you give your PDO a score on. The other questions help you to make up your mind.
- The more truly and honestly you reflect on the questions, the more useful this step will be to the organization. There are no right or wrong answers.
- There is no obligation to reflect on all the points for consideration. Just focus on those that you find most relevant because they speak to your experience. On the other hand: feel free to add points for consideration if important issues are not mentioned yet.

Building Block 1—Vision, Mission and Values				
To what extent are the PDO's vision, mission and values "alive"?	**1**	**2**	**3**	**0**

<table>
<tr><td rowspan="2">CONSIDERATIONS</td><td>The following questions may help you reflect on your experience:

a. Has the PDO developed a mission, vision and values?
b. Has all PDO personnel (leadership and staff) been involved in developing the PDO's mission, vision and values?
c. Are the mission, vision and values of the PDO clear? (f.ex., written down somewhere, easy to understand by everyone, …) Would you be able to explain them, in your own words?
d. Are the vision, mission and values of the PDO clearly salesian? In what sense?
e. Are the vision and mission of the PDO reviewed periodically for better performance?
f. In what way are lay staff involved in the review of the vision and mission of the PDO?
g. How does the PDO leadership refer to, and remind staff of, the PDO's mission, vision and values?
h. Do PDO staff engage in the vision, mission and values of the PDO and see how these relate to their work?
i. …</td></tr>
</table>

Building Block 2—Team spirit				
To what extent is there a sense of "collective drive" and energy that enable the PDO to overcome external constraints and to go ahead with decisions made?	**1**	**2**	**3**	**0**

<table>
<tr><td rowspan="2">CONSIDERATIONS</td><td>The following questions may help you reflect on your experience:

a. Are the PDO staff members conscious and aware of the PDO's role and function in the Province and in the world and do they act from this shared sense of identity?
b. Is collaboration among the PDO's staff members stimulated and encouraged by the PDO leadership?
c. Do PDO staff members believe that what they are doing is important and worthwhile?
d. Is there a collective ambition to improve the PDO's capabilities?
e. How would you describe the atmosphere in the PDO?
f. …</td></tr>
</table>

		👎	👌	👍	✋
	Building Block 3—Motivating Staff				
	To what extent does PDO leadership motivate and "empower" staff members?	**1**	**2**	**3**	**0**

CONSIDERATIONS	The following questions may help you reflect on your experience: a. How does the PDO leadership help, encourage and support staff members in their work? b. How does the PDO leadership encourage and respond to input from staff members? c. Is the PDO leadership available for communication and discussion with staff? d. Are individual and joint efforts affirmed and encouraged by PDO leadership? e. Are PDO staff members consulted in areas where they have experience and know-how? f. Are PDO staff members given opportunities to take responsibility for areas of work? Does PDO leadership delegate wisely? g. Is there a relationship of trust between PDO leadership and PDO staff? h. …

		👎	👌	👍	✋
	Building Block 4—Clarity of Role and Purpose				
	To what extent is the role and purpose of the PDO clear and accepted?	**1**	**2**	**3**	**0**

CONSIDERATIONS	The following questions may help you reflect on your experience: a. Which services is the PDO meant to deliver and for whom? b. Has the PDO been given a clear mandate by the Provincial and his / her Council? c. Is this mandate updated regularly? How? By whom? d. Is it known and accepted across the Province (i.e. at all levels and across sectors)? Are others in the Province convinced of the importance of the PDO's work? e. Is it clear and accepted where the responsibility of the PDO in project and program formulation and monitoring ends and where the responsibility of the local centers begins? f. Is the PDO's place and work recognized in the Province's official document (f.ex. Directory, organigram)? g. Does PDO leadership give direction to the role and function of the PDO? h. Is it clear to individual PDO personnel (leadership *and* staff) how their own role and function fits into the role and function of the PDO? i. …

		👎	👌	👍	✋
	Building Block 5—Recognition from Outside				
	To what extent is the PDO recognized by people / organizations from outside the salesian world?	**1**	**2**	**3**	**0**

CONSIDERATIONS	The following questions may help you reflect on your experience: a. Is the work of the PDO visible to the outside world? Does the PDO advertize and promote its work? b. Has the PDO received "official" recognition from outside? (f.ex., in the media; receiving awards; …) c. Do staff members draw a sense of "pride" or confidence from working for the PDO, because of its reputation? d. Do people / organizations outside the salesian world consider the PDO a legitimate partner? How do you know this? e. …

Step 2: Individual reflection

Tool 2B: Personal Score Sheet Core Capability 1 (CC1)

Instructions:

- For each building block, fill in your personal score (0, 1, 2 or 3) and use the space to justify your personal assessment by illustrating with examples. Focus on the PDO's strengths as well as areas for improvement.
- Please mention all of the considerations you base your answer on (in the grey area). For example, mention "5.c" under Building Block 5 if you reflected on "Do staff members draw a sense of "pride" or confidence from working for the PDO, because of its reputation?" in order to make up your mind about this building block. Etc.

Building Block 1—Vision, mission and values	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 2—Team spirit	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 3—Motivating staff	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 4—Clarity of role and purpose	**Your score:**	… / 3

Based on the following considerations:

Illustrations:

Building Block 5—Recognition from outside	**Your score:**	… / 3

Based on the following considerations:

Illustrations:

Step 3: Group reflection

Tool 3: Summary Score Sheet Core Capability 1 (CC1)

Instructions:

▪ For each building block, calculate the total score. The total score is the sum of all the personal scores.

If all the participants gave a score of "0" on a particular building block (i.e., every personal score on that building block corresponded to "I am not sure …"), then you must make up your mind as a group. On the summary score sheet, "0" is NOT an option. As a group, you must decide whether the situation is best described by "1" ("We are not OK"), "2" ("We are OK for now … but …") or "3" ("We are OK … but …"). Then multiply this consensus score by the number of participants.

▪ For each building block, use the space available to list two or three areas for improvement that the entire group agrees upon and that matter to everyone.

Formulate proposals in a positive way (f.ex., "make meetings more efficient" instead of "stop wasting time at meetings"). Focus on *what* can be improved, not on *how* this can be done.

▪ For each area for improvement that the entire group agrees upon and that matters to everyone, please mention all of the considerations were taken into account (in the grey area). For example, mention "5.c" under Building Block 5 if the group reflected on "Do staff members draw a sense of "pride" or confidence from working for the PDO, because of its reputation?" in order to make up its mind about this building block. Etc.

Building Block 1—Vision, mission and values	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 2—Team spirit	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 3—Motivation of staff	**Total score:**	… / …

Based on the following considerations:

Areas for improvement:

Building Block 4—Clarity of role and purpose	**Total score:**	… / …

Based on the following considerations:

Areas for improvement:

Building Block 5—Recognition from outside	**Total score:**	… / …

Based on the following considerations:

Areas for improvement:

Assessing CC2, the capability to perform the core functions (tasks) of the organization and to achieve results

Just as a reminder:

CC2 describes the knowledge, expertise and experience required to carry out actions and achieve the results aimed for. This includes technical and logistical skills, but also managerial capacity.

The concrete interpretation of CC2 depends on the role and core function (tasks) that the PDO actually has and those that it could aspire to.

The building blocks of CC2 are:

- Human resource management *(building block 1)*
- Financial and administrative management *(building block 2)*
- Planning and formulation *(building block 3)*
- Monitoring and evaluation *(building block 4)*
- Fundraising *(building block 5)*
- Support to capacity development of local centers *(building block 6)*

TIP:

In the assessment of CC2 stakeholder involvement is recommended. Try to consult stakeholders who know the PDO quite well; they are able to provide critical insights that insiders may not come up with.

	MODULE 2: Capacity Self-Assessment CC2

Step 1: Appetizer—Reflecting on role, function and success

You can give your PDO three medals: one gold; one silver; one bronze. Dedicate them to those three aspects of the PDO's "core business" (primary role and function) that you are most successful at.

For example:
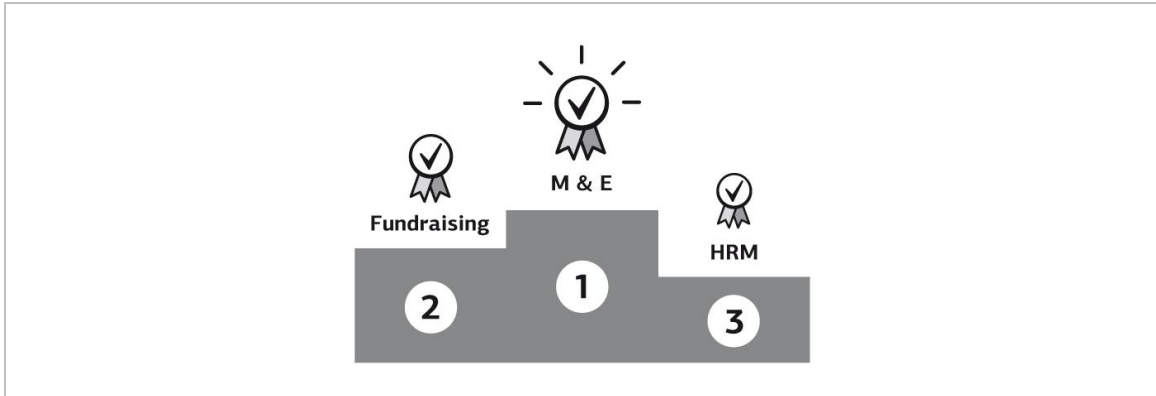
Possible aspects are: human resource management; financial and administrative management; planning and formulation; monitoring and evaluation; fundraising; support to capacity development of local centers.

Explain to each other why you award these medals.

Step 2: Individual reflection

Tool 2A: Questionnaire on Core Capability 2 (CC2)

Instructions:

▪ This questionnaire goes hand in hand with the personal score sheet on p.32. There is one main question per building block—which is the one that you give your PDO a score on. The other questions help you to make up your mind.

▪ The more truly and honestly you reflect on the questions, the more useful this step will be to the organization. There are no right or wrong answers.

▪ There is no obligation to reflect on all the points for consideration. Just focus on those that you find most relevant because they speak to your experience. On the other hand: feel free to add points for consideration if important issues are not mentioned yet.

Building Block 1—Human Resource Management				
To what extent are the PDO's human resources well-managed?	**1**	**2**	**3**	**0**

CONSIDERATIONS	The following questions may help you reflect on your experience: a. Does the PDO have sufficient people with the necessary professional skills and experience in order to carry out the work to be done? b. Is the best use made of the human resources available to the PDO? c. Are job descriptions clear for each position within the PDO? (f.ex., duties and responsibilities, reporting relationships, skills required, … are clear) d. Are procedures for recruitment, termination of employment and work rules clear to all staff? Is there a personnel handbook? e. Does the PDO comply with existing labor regulations? (f.ex., contracts, health insurance, social insurance and pension, holidays, …) f. Do PDO staff members consider the terms and conditions of employment to be fair (f.ex., salary levels, holidays, health benefits, …) g. How are foreign volunteers and expat personnel integrated in the PDO's work? h. …

Building Block 2—Financial and Administrative Management				
To what extent are the PDO's financial and material resources well-managed?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

    a. Does the PDO have an official legal base (is it registered?) and up-to-date statutes?
    b. Does the PDO have sufficient financial resources to carry out its main function / tasks?

c. Is the best use made of the financial and material resources available to the PDO?
d. Is there clarity about the PDO's own budget and finances? (i.e. distinct from budget of the Province and from budgets of development projects and programs) Does PDO have access to clear and accurate information about its own resources?
e. Are financial deficits anticipated and avoided?
f. How does the PDO deal with fluctuating exchange rates which may impact budget available for foreign donor-financed development projects and programs?
g. Does the PDO have an annual financial report, including income and expenditure for the period covered, together with brief explanations for any discrepancies?
h. Which accounting procedures are in place? (f.ex., regular independent audit, financial reports comply with national accounting standards, …)
i. Which software does the PDO use for bookkeeping / accounting? Does the accounting system comply with national accounting standards?
j. Are the PDO's office(s), infrastructure, equipment and materials in good condition?
k. Is there a strategy for maintaining and upgrading the PDO's office(s), infrastructure, equipment and materials?
l. …

Building Block 3—Planning and Formulation				
To what extent does the PDO master the processes of planning and formulation?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Does the PDO assist in the process of drafting and elaborating the Overall Provincial Plan (OPP / POI) and the Salesian Educative Pastoral Plan (SEPP / PEPS)?
b. Does the PDO have its own strategic plan? Are the PDO's own objectives realistic, measurable and achievable within a set timeframe?
c. Does this strategic plan take into account the human and financial resources available?
d. Does the PDO formulate development programs and projects for several of the sectors in the Province? (i.e., not only for Youth at Risk or only for vocational training centers, …)
e. Which methodologies does the PDO apply to plan and formulate development projects and programs? (f.ex., SWOT, problem tree, risk analysis, internal / external scan, …)
f. How does the PDO ensure that planning and formulation is done in a participatory manner—that is, by mobilizing and involving stakeholders, such as the local centers and their beneficiaries?
g. Does the PDO ensure that the development programs and projects submitted to donors are aligned with the priorities of the OPP / POI and SEPP / PEPS?
h. Does the PDO properly identify threats and opportunities in the context and take these into account when formulating development programs and projects?
i. Does the PDO formulate development programs and projects that address the causes of social evils such as marginalization and poverty, and not just the symptoms? Are the development programs and projects that are formulated truly *preventive*?
j. …

Building Block 4—Monitoring and Evaluation				
To what extent does the PDO master the processes of monitoring and evaluation?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Does the PDO regularly check whether it is achieving its own objectives and are plans altered when / where necessary? Does the PDO the lessons learned from this review into practice?

b. Does the PDO assist the Provincial and his / her Council in monitoring and evaluating the implementation of the Overall Provincial Plan (OPP / POI; or similar Province-level plan for FMA) and the Salesian Educative Pastoral Plan (SEPP / PEPS; or similar plan for FMA)?

c. How does the PDO assist the Provincial and his / her Council to get a clear view on the state of the local centers? (f.ex., by regularly reporting about funds obtained for development projects in the province or about findings from the monitoring activities carried out by the PDO)

d. How does the PDO see the role of M&E? Accountability? Learning?

e. Does the PDO provide monitoring reports that live up to donors' expectations?

f. Do PDO staff members have the competences and experience that are needed for M&E?

g. Which methodologies does the PDO apply to monitor and evaluate development projects and programs? (f.ex., logical framework approach; outcome mapping; most significant change; …)

h. Does the PDO assist donors in formulating SMART indicators for development programs and projects?

i. Does the PDO have its own M&E system? Can the information gathered be used as a basis for reporting to different donors? Is the M&E system feasible for local centers?

j. Do local centers respect the PDO and are they willing to let their donor-funded activities and expenditures be monitored by the PDO?

k. …

		☞	✊	👍	✋
Building Block 5—Fundraising					
To what extent is the PDO able to raise funds for the development projects and programs running across the Province?		**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Does the PDO raise funds for development programs and projects for several of the sectors in the Province? (i.e., not only for Youth at Risk or only for vocational training centers, …)

b. Does the PDO have an up-to-date overview of potential donors? Does the PDO know and have contact with non-salesian donors, both nationally and internationally?

c. Does the PDO actively enlarge its knowledge of existing funding opportunities and does it inform local centers of such opportunities in a timely manner?

d. Has there been an increase in the amount of donor funding that the PDO has managed to attract for the development programs and projects running across the Province?

e. How does the PDO become aware of the need for development funding across the Province (commissions, local centers, …)?

f. How successful is the PDO in getting development programs and projects accepted by donors? Is the PDO able to raise more and more funds?

g. Has there been an increase in the diversity of donor funding that the PDO has managed to attract?

h. …

		☞	✊	👍	✋
Building Block 6—Support to Capacity Development of Local Centers					
To what extent is the PDO able to support the capacity development of local centers?		**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Does the PDO consider supporting LCs' capacity development to be a part of its role? How do you view this role exactly?

b. To what extent is the role of the PDO as a "supporter" of the LCs capacity development recognized and appreciated? By LCs? By the PDO itself?

c. In what way is the PDO supporting the LCs capacity development? Which results—in terms of increased capacity—have occurred at the level of LCs thanks to your support?

d. In the process of supporting the LCs' capacity development, how does the PDO gather information about the LC's existing strengths and weaknesses?

e. How does the PDO plan the support it will provide to the LCs' capacity development? How does the PDO ensure that this planning is done in a participatory manner?

f. To what extent are monitoring visits used as an opportunity to give advice to LCs and to identify lessons to be learned from M&E? How does the PDO prepare its advice to LCs?

g. To what extent are opportunities for knowledge sharing provided to LCs? How is networking among LCs stimulated?

h. …

Step 2: Individual reflection

Tool 2B: Personal Score Sheet Core Capability 2 (CC2)

Instructions:

- For each building block, fill in your personal score (0, 1, 2 or 3) and use the space to justify your personal assessment by illustrating with examples. Focus on the PDO's strengths as well as areas for improvement.

- Please mention all of the considerations that you base your answer on (in the grey area). For example, mention "3.c" under Building Block 3 if you reflected on "Does this strategic plan take into account the human and financial resources available?" in order to make up your mind about this building block. Etc.

Building Block 1—Human resource management	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 2—Financial and administrative management	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 3—Planning and formulation	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 4—Monitoring and evaluation	Your score:	… / 3

Based on the following considerations:

Illustrations:

Building Block 5—Fundraising	Your score:	… / 3

Based on the following building blocks:

Illustrations:

Building Block 6—Support to capacity development of local centers	Your score:	… / 3

Based on the following building blocks:

Illustrations:

Step 3: Group reflection

Tool 3: Summary Score Sheet Core Capability 2 (CC2)

Instructions:

- For each building block, calculate the total score. The total score is the sum of all the personal scores.

  If all the participants gave a score of "0" on a particular building block (i.e., every personal score on that building block corresponded to "I am not sure …"), then you must make up your mind as a group. On the summary score sheet, "0" is NOT an option. As a group, you must decide whether the situation is best described by "1" ("We are not OK"), "2" ("We are OK for now … but …") or "3" ("We are OK … but …"). Then multiply this consensus score by the number of participants.

- For each building block, use the space available to list two or three areas for improvement that the entire group agrees upon and that matter to everyone.

  Formulate proposals in a positive way (f.ex., "make meetings more efficient" instead of "stop wasting time at meetings"). Focus on *what* can be improved, not on *how* this can be done.

- For each area for improvement that the entire group agrees upon and that matters to everyone, please mention all of the considerations that were taken into account (in the grey area). For example, mention "3.c" under Building Block 3 if the group reflected on "Does this strategic plan take into account the human and financial resources available?" in order to make up its mind about this building block. Etc.

Building Block 1—Human resource management	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 2—Financial and administrative management	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 3—Planning and formulation	**Total score:**	... / ...
Based on the following considerations:		

Areas for improvement:

Building Block 4—Monitoring and evaluation	**Total score:**	... / ...
Based on the following considerations:		

Areas for improvement:

Building Block 5—Fundraising	**Your score:**	... / 3
Based on the following considerations:		

Areas for improvement:

Building Block 6—Support to capacity development of local centers	**Your score:**	... / 3
Based on the following considerations:		

Areas for improvement:

Assessing CC3, the capability to relate and network with other organizations; to attract resources and support

Just as a reminder:

CC3 refers to the fact that an organization does not stand on its own. It must be able to analyze and understand its own environment and initiate, manage and maintain key relationships with other organizations and individuals in order to attract support and resources for its continued existence.

This capability is thus about the ability to earn credibility and legitimacy, to buffer the organization from intrusions and to earn the trust of others. Through building coalitions and alliances, one's position can be consolidated and effectiveness can be enhanced.

On the other hand, organizations frequently have to compete for power, space, support and resources with a variety of other actors. CC3 therefore also describes an organization's ability to influence its stakeholders and environment through negotiation and advocacy.

The building blocks of CC3 are:

- Obtaining and mobilizing resources and support *(building block 1)*
- Influencing people and institutions in positions of power *(building block 2)*
- Networking *(building block 3)*
- Relationships with the Provincial and his / her Council and other sectors *(building block 4)*
- Relationships with local centers *(building block 5)*
- Relationships with donors *(building block 6)*
- Relationships with the private sector *(building block 7)*
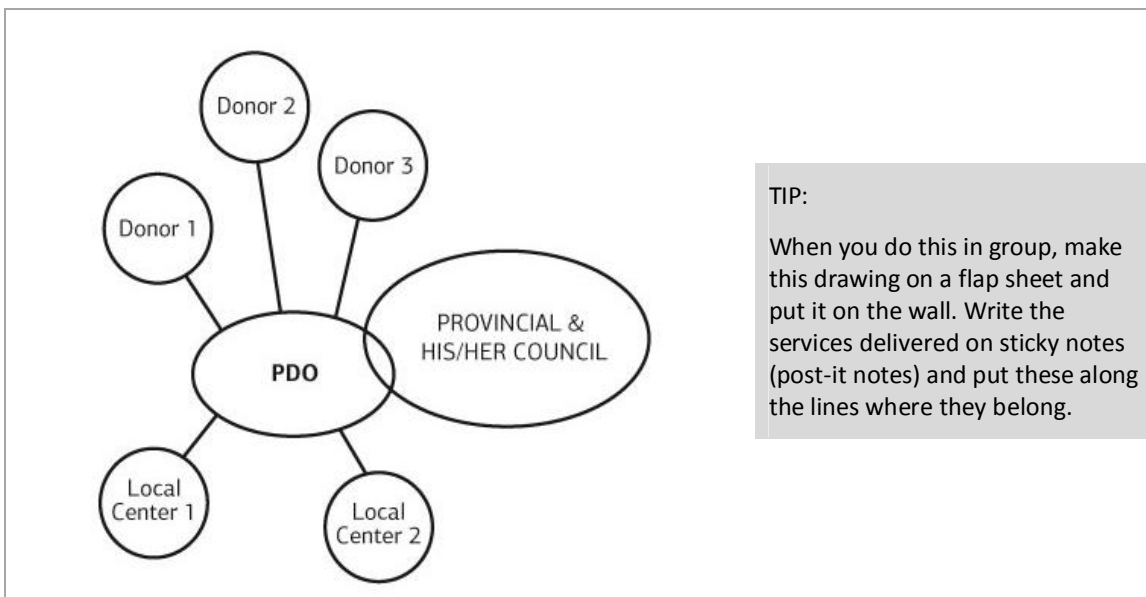
TIP:

In the assessment of CC3 stakeholder involvement is recommended, particularly when it comes to assessing the PDO's relationships with them. Try to consult stakeholders who know the PDO quite well; they are able to provide critical insights that insiders may not come up with.

Step 1: Appetizer—Mapping out the PDO's relationships

Start from this drawing and complete it with (links to) any other organizations that your PDO has relationships with.

TIP:

When you do this in group, make this drawing on a flap sheet and put it on the wall. Write the services delivered on sticky notes (post-it notes) and put these along the lines where they belong.

For all of the links, discuss the nature of the relationships. F.ex., funding relationship, ally in lobby and advocacy, support for PDO's capacity development, …

Discuss the quality of these relationships. F.ex., are these relationships well maintained (contact is regular, …; contacts are institutionalized and do not just depend on personal connections) and based on mutual trust?

Discuss the benefits that your PDO draws from these relationships. F.ex., resources and support, such as funding, technical expertise, contacts, ….

Step 2: Individual reflection

Tool 2A: Questionnaire on Core Capability 3 (CC3)

Instructions:

- This questionnaire goes hand in hand with the personal score sheet on pp.40-41. There is one main question per building block—which is the one that you give your PDO a score on. The other questions help you to make up your mind.
- The more truly and honestly you reflect on the questions, the more useful this step will be to the organization. There are no right or wrong answers.
- There is no obligation to reflect on all the points for consideration. Just focus on those that you find most relevant because they speak to your experience. On the other hand: feel free to add points for consideration if important issues are not mentioned yet.

		☝	✋	👍	✍
	Building Block 1—Obtaining and mobilizing resources and support				
	To what extent is the PDO able to mobilize resources and support, thanks to the relationships it maintains?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: a. How does the PDO ensure that it has sufficient funds to cover its own operational and structural costs? b. Does the PDO receive sufficient support from its main stakeholders—from the Provincial and His / Her Council, from donors, from local centers? c. Is there a variety of sources of funding to support the PDO's work / functioning? d. Is the PDO able to attract committed and motivated volunteers who contribute to the achievement of the PDO's plans? e. …				
		☝	✋	👍	✍
	Building Block 2—Influencing people and institutions in positions of power				
	To what extent does the PDO influence the policies and practices of people and institutions in positions of power, outside the structures of the SDB / FMA Province?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience:[8] a. Does the PDO consider advocacy and lobbying to be part of its role? If yes, can you name one of the PDO's advocacy issues? b. Does the PDO have a clear sense of the importance of the advocacy issues it focuses on and of the feasibility of policy change? c. Is the PDO able to collect sound and persuasive data on the effects of the policy sought to be changed?				

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[8] Based on: Pact (2005). Strengthening and measuring advocacy capacity of civil society organisations. [Online] Available at: http://www.pactworld.org/galleries/resource-center/strengthening_measuring_adv_capacity_csos.pdf (last accessed: January 5, 2012)

d. Is the PDO able to systematically secure input from its stakeholders in the Province on the need for the policy change?

e. Is the PDO able—together with its stakeholders in the Province—to formulate viable alternative policy positions?

f. Does the PDO devote resources (time and money) for advocacy on targeted policy issues?

g. Does the PDO provide public education and build public support (including through use of the media) for proposed policy changes? With success? Who do you reach?

h. Is the PDO able to build coalitions and networks to enlist others in joint action to secure policy changes? Has the PDO joined coalitions and networks to secure policy change?

i. Does the PDO engage in direct action with the legislative and/or executive decision-makers empowered to effect policy change? Does the PDO manage to influence laws and regulations?

j. After a policy change is effected, does the PDO take follow-up action to foster implementation of the policy change?

k. …

	☝	✊	👍	✍

Building Block 3—Networking				
To what extent can the PDO be described as a "pro-active networker"?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Why does the PDO engage in networking? What are the potential benefits / risks?

b. To what extent does PDO leadership stimulate staff to engage in networking?

c. Who from the PDO participates in networking?

d. Does the PDO actively identify opportunities for collaboration or exchange with other organizations, in line with its own mission and strategy?

e. Does the PDO go out to develop its relationships on its own account, or does it (simply) remain open to the propositions of others?

f. Does the PDO work with other organizations (not stakeholders) in partnership on common issues in order to have greater impact?

g. Does the PDO make its resources (f.ex., information and knowledge; human resources; financial resources) available to other organizations? Why?

h. Does the PDO learn from, and share lessons learned with, other organizations as part of its own capacity development?

i. Does the PDO venture out of its "comfort zone" (i.e., building and maintaining connections well beyond organizations and people where there is a long "common story", s.a. other members of the Salesian family) in order to achieve its objectives and gather support?

j. Can you name at least three (online) communities / networks that could be interesting to the PDO? Is the PDO a member? If yes, is there follow-up?

k. …

	☝	✊	👍	✍

CONSIDERATIONS

Building Block 4—Relationships with Provincial and his / her Council and Other Sectors of the Province				
To what extent is there a relationship of trust and mutual support between the PDO and the Provincial and his / her Council and other sectors?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Are the Provincial and the members of his / her Council convinced about the PDO's importance?

b. How would you describe the communication between the PDO and the Provincial and his / her Council?

c. Does the PDO report to the Provincial and his / her Council on a regular basis? (f.ex., about funds obtained for development projects in the Province; about findings from monitoring activities; …)

d. Is the PDO in a position to influence the "mindset" of the Provincial and his / her Council? (f.ex., from a "charity" perspective to a perspective of "systematic development work")
e. Is the PDO accountable to the Provincial and his / her Council?
f. How would you describe the communication between the PDO and other commissions / sectors of the Province? (f.ex., youth pastoral, social communications, education commission, economic commission, …)
g. Does the PDO collaborate with other commissions / sectors of the Province? (f.ex., youth pastoral, social communications, education commission, …)
h. …

Building Block 5—Relationships with local centers				
To what extent is there a relationship of trust and mutual support between the PDO and the local centers across the Province?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Are the leadership and staff at the local centers convinced about the PDO's importance?
b. Does the PDO work with local centers of all or at least various different sectors of the Province? (f.ex., not only TVET centers)
c. How would you describe the communication between the PDO and the local centers?
d. Does the PDO receive the information it needs from local centers on time?
e. Does the PDO regularly and openly communicate its strategies, decisions and achieved results to the local centers?
f. Are there regular face-to-face meetings between representatives from the PDO and the local centers?
g. Do the PDO and local centers feel confident to discuss difficult issues with each other? (f.ex., difficulties meeting expected results, suspicion of fraud, funding decisions, …)
h. …

Building Block 6—Relationships with donors				
To what extent is there a relationship of trust and mutual support between the PDO and the donors it works with?	**1**	**2**	**3**	**0**

The following questions may help you reflect on your experience:

a. Are the nature and purpose of the relationships between the PDO and donors clear?
b. Does the PDO feel confident to raise difficult issues with donors? (f.ex., discomfort with certain donor demands, difficulties meeting expected results, …)
c. How does the PDO build and maintain good relationships with donors? Which actions do you actually undertake?
d. How does the PDO deal with cases of financial mismanagement with donor funds? How are such cases communicated to donors? How are problems resolved?
e. Does the PDO generally feel that donors are "too present" or "too much in control", or that donors "steal" the PDO's decisions?
f. Does the PDO generally meet donors' deadlines? Are donors sufficiently understanding when deadlines are missed because of unforeseen circumstances?
g. …

		☝	✌	👍	🤚
	Building Block 7—Relationships with private sector				
	To what extent is there a relationship of trust and mutual support between the PDO and the private sector partners it works with?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: a. Does the PDO see and seize opportunities to collaborate with the private sector? (f.ex. under Corporate Social Responsibility programs) b. How would you describe the nature and purpose of the relationships between the PDO and the private sector? c. How does the PDO build and maintain good relationships with the private sector? Which actions do you actually undertake? d. Does the PDO feel confident to raise difficult issues with the private sector? (f.ex., discomfort with certain company practices in terms of impact on environment, final beneficiaries, …) e. …				

Step 2: Individual reflection

Tool 2B: Personal Score Sheet Core Capability 3 (CC3)

Instructions:

▪ For each building block, fill in your personal score (0, 1, 2 or 3) and use the space to justify your personal assessment by illustrating with examples. Focus on the PDO's strengths as well as areas for improvement.

▪ Please mention all of the considerations that you base your answer on (in the grey area). For example, mention "2.j" under Building Block 2 if you reflected on "After a policy change is effected, does the PDO take follow-up action to foster implementation of the policy change?" in order to make up your mind about this building block. Etc.

Building Block 1—Mobilizing and obtaining resources and support	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 2—Influencing people and institutions in positions of power	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 3—Networking	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 4—Relationships with Provincial and his / her Council and other sectors	Your score:	… / 3

Based on the following considerations:

Illustrations:

Building Block 5—Relationships with local centers	Your score:	… / 3

Based on the following considerations:

Illustrations:

Building Block 6—Relationships with donors	Your score:	… / 3

Based on the following considerations:

Illustrations:

Building Block 7—Relationships with private sector	Your score:	… / 3

Based on the following considerations:

Illustrations:

Step 3: Group reflection

Tool 3: Summary Score Sheet Core Capability 3 (CC3)

Instructions:

- For each building block, calculate the total score. The total score is the sum of all the personal scores.

  If all the participants gave a score of "0" on a particular building block (i.e., every personal score on that building block corresponded to "I am not sure …"), then you must make up your mind as a group. On the summary score sheet, "0" is NOT an option. As a group, you must decide whether the situation is best described by "1" ("We are not OK"), "2" ("We are OK for now … but …") or "3" ("We are OK … but …"). Then multiply this consensus score by the number of participants.

- For each building block, use the space available to list two or three areas for improvement that the entire group agrees upon and that matter to everyone.

  Formulate proposals in a positive way (f.ex., "make meetings more efficient" instead of "stop wasting time at meetings"). Focus on *what* can be improved, not on *how* this can be done.

- For each area for improvement that the entire group agrees upon and that matters to everyone, please mention all of the considerations that were taken into account (in the grey area). For example, mention "2.j" under Building Block 2 if the group reflected on "After a policy change is effected, does the PDO take follow-up action to foster implementation of the policy change?" in order to make up its mind about this building block. Etc.

Building Block 1—Mobilizing and obtaining resources and support	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 2—Influencing people and institutions in positions of power	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 3—Networking	**Total score:**	... / ...

Based on the following considerations:

Areas for improvement:

Building Block 4—Relationships with Provincial and his / her Council and other sectors	**Total score:**	... / ...

Based on the following considerations:

Areas for improvement:

Building Block 5—Relationships with local centers	**Total score:**	... / ...

Based on the following considerations:

Areas for improvement:

Building block 6: Relationships with donors	**Total score:**	... / ...

Based on the following considerations:

Areas for improvement:

Building block 7: Relationships with private sector	**Total score:**	... / ...

Based on the following considerations:

Areas for improvement:

Assessing CC4, the capability to adapt and self-renew

Just as a reminder:

A PDO that is not able to change as the context and times change, will die—it will become stagnant, overly bureaucratic, etc. and lose its relevance and its support.

CC4 refers to the capability to learn continuously, to take on new roles and to handle change. CC4 is not only a key requisite for organizational survival, it is also central to an organization's ability to continue to be relevant, effective and efficient within a changing environment and towards changing needs. Capacity from this perspective is also about the ability of an organization to cope with shocks—f.ex., unforeseen government or funder decisions, natural disasters, loss of key staff, etc.

Dealing with change requires qualities, such as resourcefulness, innovation and initiative, the courage to experiment without undue fear, etc. An adaptive leadership culture can facilitate these qualities by providing opportunities to learn and creating confidence to change.

The building blocks of CC4 are:

- Organizational change *(building block 1)*
- Culture of learning *(building block 2)*
- Documenting and sharing knowledge and lessons learned *(building block 3)*
- Resilience *(building block 4)*

Step 1: Appetizer—Mapping critical moments

Draw the timeline of your PDO since its existence and indicate those moments that represent a significant change in the life of your organization. The critical moments are "turning points", they are moments of change when the situation of the PDO became better or worse.

Discuss how your PDO handled significant changes: to what extent were you "in the driver's seat" at critical moments; to what extent did critical change come from "within"; to what extent was it anticipated; to what extent was it imposed and how did you then cope; …

Step 2: Individual reflection

Tool 2A: Questionnaire on Core Capability 4 (CC4)

Instructions:

▪ This questionnaire goes hand in hand with the personal score sheet on p.48. There is one main question per building block—which is the one that you give your PDO a score on. The other questions help you to make up your mind.

▪ The more truly and honestly you reflect on the questions, the more useful this step will be to the organization. There are no right or wrong answers.

▪ There is no obligation to reflect on all the points for consideration. Just focus on those that you find most relevant because they speak to your experience. On the other hand: feel free to add points for consideration if important issues are not mentioned yet.

		☞	👎	👍	✍
	Building Block 1—Organizational change				
	To what extent is organizational change accepted and encouraged?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may inform your assessment where relevant: a. Does the PDO leadership have a clear sense of how the organization should evolve over the next few years? b. Is experimentation encouraged and are mistakes accepted as an inevitable part of this? c. Can you name at least two innovations that the PDO has deliberately made in its strategic interventions, products and services? (f.ex., in order to grow from project office to PDO) d. How are changes in the context that will affect the PDO anticipated? Are these changes turned into opportunities to improve the working of the PDO? e. How does the PDO translate the Preventive System to contemporary realities in order to face changing development needs? f. Does the Provincial and his / her Council accept and encourage change within / of the PDO? g. Do new ideas and changes come from all levels of the PDO and is this accepted? h. How (quickly) does the PDO respond to and manage unplanned change or new opportunities? i. …				

		☞	👎	👍	✍
	Building Block 2—Culture of learning				
	To what extent are concrete measures taken to encourage a culture of learning?	**1**	**2**	**3**	**0**
	The following questions may inform your assessment where relevant: a. How and from whom does PDO personnel get advice and feedback? b. How are field visit reports (f.ex., from monitoring visits to LCs, from visits to donors, …) valorized and shared? How are lessons learned used to adapt running projects and programs? c. Does the PDO share the lessons learnt through M&E with local centers and ensure these lessons are taken into account in development program and project planning and implementation? How are lessons learned used to improve formulation and monitoring of development projects and programs?				

    d.   Is the PDO involved in research / accumulation of expertise in areas such as TVET / skills development, rural development, … in order to ensure that the Province's plans and programs are relevant to the specific groups that they target?

    e.   Are resources and opportunities provided to PDO personnel so that they can improve their competences—through training or other means?

    f.   Does the PDO make use of innovation and lessons learned by other (similar) organizations?

    g.   Is there an atmosphere of openness and sharing of knowledge?

    h.   …

Building Block 3—Documenting and sharing knowledge and lessons learned			
To what extent is attention paid to building and maintaining organizational memory?	**1**	**2**	**3**	**0**

The following questions may inform your assessment where relevant:

    a.   Does the PDO have mechanisms for "remembering" the experience of its current and previous work? (f.ex., reports of internal meetings, databases and archives)

    b.   Does PDO personnel find the information needed to do the work easily and within a reasonable amount of time?

    c.   Is information shared correctly and promptly within the PDO so that all PDO personnel have the necessary information to carry out their job effectively?

    d.   How is knowledge transferred in cases of succession? (f.ex., rotation of PDO director, when s/he is Provincial Economer) In cases of staff leaving? (f.ex., lay staff member moves on to another job)

    e.   How are new staff members "welcomed" and introduced into the job, the PDO and working in the salesian context?

    f.   …

Building Block 4—Resilience			
To what extent is the PDO able to carry out its mission in situations of adversity?	**1**	**2**	**3**	**0**

The following questions may inform your assessment where relevant:

    a.   Is the PDO aware of its own vulnerabilities? (f.ex., extreme dependence on one donor) Is the PDO undertaking action to reduce these vulnerabilities?

    b.   How does the PDO calculate financial risk and is there willingness to both take and refuse to take risks?

    c.   Would PDO personnel know what to do in a crisis? (f.ex., loss of telecommunications networks for a long period of time; fire / earthquake / explosion / war / …; major fraud with donor funds; …)

    d.   Is it clear what the minimum requirements are that need to be in place in order for the PDO to be able to operate following a crisis?

    e.   Does the PDO have a financial cushion sufficient to provide a margin of safety in terms of cash flow, having cash on hand to carry on through a month or more?

    f.   …

Step 2: Individual reflection

Tool 2B: Personal Score Sheet Core Capability 4 (CC4)

Instructions:

▪ For each building block, fill in your personal score (0, 1, 2 or 3) and use the space to justify your personal assessment by illustrating with examples. Focus on the PDO's strengths as well as areas for improvement.

▪ Please mention all of the considerations that you base your answer on (in the grey area). For example, mention "4.b." under Building Block 4 if you reflected on "How does the PDO calculate financial risk and is there willingness to both take and refuse to take risks?" in order to make up your mind about this building block. Etc.

Building Block 1—Organizational change	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 2—Culture of learning	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 3—Documenting and sharing knowledge and lessons learned	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 4—Resilience	Your score:	… / 3
Based on the following considerations:		

Illustrations:

Step 3: Group reflection

Tool 3: Summary Score Sheet Core Capability 4 (CC4)

Instructions:

▪ For each building block, calculate the total score. The total score is the sum of all the personal scores.

If all the participants gave a score of "0" on a particular building block (i.e., every personal score on that building block corresponded to "I am not sure …"), then you must make up your mind as a group. On the summary score sheet, "0" is NOT an option. As a group, you must decide whether the situation is best described by "1" ("We are not OK"), "2" ("We are OK for now … but …") or "3" ("We are OK … but …"). Then multiply this consensus score by the number of participants.

▪ For each building block, use the space available to list two or three areas for improvement that the entire group agrees upon and that matter to everyone.

Formulate proposals in a positive way (f.ex., "make meetings more efficient" instead of "stop wasting time at meetings"). Focus on *what* can be improved, not on *how* this can be done.

▪ For each area for improvement that the entire group agrees upon and that matters to everyone, please mention all of the considerations that were taken into account (in the grey area). For example, mention "4.b" under Building Block 4 if the group reflected on "How does the PDO calculate financial risk and is there willingness to both take and refuse to take risks?" in order to make up its mind about this building block. Etc.

Building Block 1—Organizational change	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 2—Culture of learning	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 3—Documenting and sharing knowledge and lessons learned	**Total score:**	… / …

Based on the following considerations:

Areas for improvement:

Building Block 4—Resilience	**Total score:**	… / …

Based on the following considerations:

Areas for improvement:

Assessing CC5, the capability to balance coherence and diversity and to encourage both stability and innovation

Just as a reminder:

CC5 refers to the ability to find effective linkages between different organizational objectives and stakeholder interests.

An organization needs diversity: a broad variety of skills / competencies; a variety of perspectives and ways of thinking among its members and divisions (teams, departments, …). Diversity is a prerequisite for continuous renewal and innovation. This way, it can develop resilience and the flexibility to react adequately to different situations. At the same time, an organization needs to prevent fragmentation so as not to lose focus. It is important to stay true to your core values, identity, and good practices.

The mix of competencies among staff needs to be kept in balance—f.ex., balance between "hard" or technical skills and "soft" skills, etc. The capability to achieve coherence often also concerns a balancing act between centralized control and decentralization—f.ex., in the case of PDO's with a central office and "antennas"; in the relationship between PDO and local centers; etc.

The building blocks of CC5 are:

- Maintaining strategic coherence *(building block 1)*
- Maintaining organizational coherence *(building block 2)*
- Balancing diversity and coherence of viewpoints *(building block 3)*
- Staying grounded or rooted *(building block 4)*

Step 1: Appetizer—Do you feel like you're being pulled in different directions?

Think of your PDO as a person that is being pulled in different directions: f.ex., donors may try to influence your priorities, by targeting their funding towards their own interests; local centers may try to increase their "room for maneuver" when implementing projects and agreed-upon operational plans; etc.
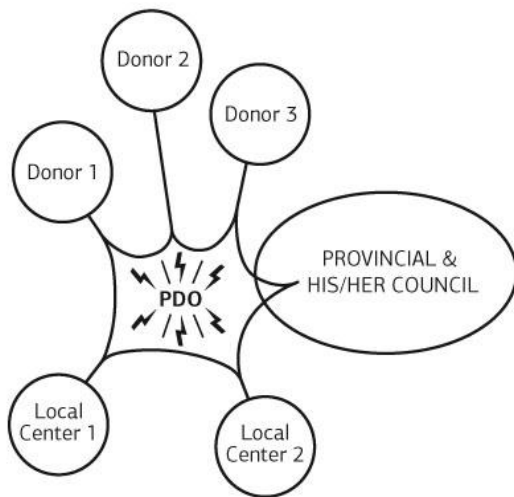
TIP:

When you discuss this in group, try to think of concrete examples. Think of situations where the PDO had to perform a real "balancing act" between different interests and different points of view. These situations can involve different actors than those in the drawing.

Discuss how your PDO handles these different influences. How do you stay focused on your own priorities and targets? What do you need to stay focused? Does your PDO have something like "non-negotiables" to help you stay focused?

Step 2: Individual reflection

Tool 2A: Questionnaire on Core Capability 5 (CC5)

Instructions:

- This questionnaire goes hand in hand with the personal score sheet on p.54. There is one main question per building block—which is the one that you give your PDO a score on. The other questions help you to make up your mind.
- The more truly and honestly you reflect on the questions, the more useful this step will be to the organization. There are no right or wrong answers.
- There is no obligation to reflect on all the points for consideration. Just focus on those that you find most relevant because they speak to your experience. On the other hand: feel free to add points for consideration if important issues are not mentioned yet.

			🖑	🖑	🖑	🖑
	Building Block 1—Maintaining strategic coherence					
	To what extent does the PDO stay "true to itself" even under pressure?		**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: a. Are important decisions made with the mission, vision and values of the PDO clearly in mind? b. Does the PDO have a sense of what is non-negotiable with stakeholders? Does all PDO personnel share the same understanding? c. Can you give examples of situations in which the PDO felt its mission, vision and values could be compromised and still stayed true to itself? d. …					
			🖑	🖑	🖑	🖑
	Building Block 2—Maintaining organizational coherence **(only applies to PDOs with "antennas")**					
	To what extent are the central office and the "antennas" on the same page?		**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: a. Has there been strategic reflection about having a centralized / decentralized set-up? b. Is there a shared sense of vision, mission and strategies between the central office and the "antennas"? c. Are the central office and the "antennas" all clear about their role and responsibilities and the division of labor? d. Do the central office and the "antennas" all work to implement the same, agreed-upon strategy? e. Is important information shared promptly between the central office and its "antennas"? (this works in both directions) f. Are both the central office and the "antennas" involved in important decisions? g. …					

		⌾	👍	👍	✋
	Building Block 3—Balancing diversity of viewpoints				
	To what extent is the PDO able to handle different viewpoints and perspectives?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: a. How do the PDO leadership and staff bring together the inspiration of Salesian charism with the orientations of contemporary development thinking? b. How and to what extent does the PDO succeed in translating the Salesian development project so that it can be understood and supported by non-Salesian organizations? c. Do the people working for the PDO represent a healthy mix of competences, backgrounds (SDB / FMA and lay) and personalities? d. …				

		⌾	👍	👍	✋
	Building Block 4—Staying grounded or rooted				
	To what extent does the PDO stay in touch with its roots?	**1**	**2**	**3**	**0**
CONSIDERATIONS	The following questions may help you reflect on your experience: ▪ Does the PDO stay in touch with society, particularly with the needs of the marginalized / vulnerable? ▪ Does the PDO stay in touch with the times, particularly when responding to changing development needs and needs of the marginalized / vulnerable? ▪ Does the PDO stay in touch with Salesian charism? Is this charism passed on to new staff? ▪ Is the PDO able to distinguish between "change for the sake of change" (f.ex. fanciful new development theories that come and go) and "change that really matters" (i.e., necessary change, for the better)? ▪ …				

Step 2: Individual reflection

Tool 2B: Personal Score Sheet Core Capability 5 (CC5)

Instructions:

- For each building block, fill in your personal score (0, 1, 2 or 3) and use the space to justify your personal assessment by illustrating with examples. Focus on the PDO's strengths as well as areas for improvement.

- Please mention all of the considerations that you base your answer on (in the grey area). For example, mention "1.b." under Building Block 1 if you reflected on "Does the PDO have a sense of what is non-negotiable with stakeholders? Does all PDO personnel share the same understanding?" in order to make up your mind about this building block. Etc.

Building Block 1—Maintaining strategic coherence	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 2—Maintaining organizational coherence	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 3—Maintaining a balance of perspectives	**Your score:**	… / 3
Based on the following considerations:		
Illustrations:		

Building Block 4—Staying grounded or rooted	**Your score:**	… / 3
Based on the following considerations:		

Illustrations:

Step 3: Group reflection

Tool 3: Summary Score Sheet Core Capability 5 (CC5)

Instructions:

▪ For each building block, calculate the total score. The total score is the sum of all the personal scores.

  If all the participants gave a score of "0" on a particular building block (i.e., every personal score on that building block corresponded to "I am not sure …"), then you must make up your mind as a group. On the summary score sheet, "0" is NOT an option. As a group, you must decide whether the situation is best described by "1" ("We are not OK"), "2" ("We are OK for now … but …") or "3" ("We are OK … but …"). Then multiply this consensus score by the number of participants.

▪ For each building block, use the space available to list two or three areas for improvement that the entire group agrees upon and that matter to everyone.

  Formulate proposals in a positive way (f.ex., "make meetings more efficient" instead of "stop wasting time at meetings"). Focus on *what* can be improved, not on *how* this can be done.

▪ For each area for improvement that the entire group agrees upon and that matters to everyone, please mention all of the considerations that were taken into account (in the grey area). For example, mention "1.b" under Building Block 1 if the group reflected on "Does the PDO have a sense of what is non-negotiable with stakeholders? Does all PDO personnel share the same understanding?" in order to make up its mind about this building block. Etc.

Building Block 1—Maintaining strategic coherence	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 2—Maintaining organizational coherence	**Total score:**	… / …
Based on the following considerations:		
Areas for improvement:		

Building Block 3—Maintaining a balance of perspectives	**Total score:**	... / ...
Based on the following considerations:		
Areas for improvement:		

Building Block 4—Staying grounded or rooted	**Total score:**	... / ...
Based on the following considerations:		
Areas for improvement:		

Step 4: Synthesis of PDO capacity

Tool 4: Overall Score Sheet

Instructions:

- For all of the building blocks under each of the core capabilities, copy and paste the total scores and agreed upon areas for improvement into the overall score sheet.

  Don't add any new areas for improvement.

- Make sure everyone who participated in the self-assessment gets a copy of this overall score sheet … this way, everyone can help monitor whether the capacity development efforts undertaken are actually addressing the areas for improvement that were identified.

> TIP:
>
> When you do this in group, reproduce the overall score sheet on a flap sheet and put it on the wall. Use sticky notes (post-it notes) to put the agreed upon areas for improvement where they belong. Keep this overview on the wall as long as possible … it will help you monitor whether, over time, capacity is improving in those areas that were identified as "in need of amelioration."

BB1—Total score: *Areas for improvement:*	**BB1—Total score:** *Areas for improvement:*	**BB1—Total score:** *Areas for improvement:*	**BB1—Total score:** *Areas for improvement:*	**BB1—Total score:** *Areas for improvement:*
BB2—Total score: *Areas for improvement:*	**BB2—Total score:** *Areas for improvement:*	**BB2—Total score:** *Areas for improvement:*	**BB2—Total score:** *Areas for improvement:*	**BB2—Total score:** *Areas for improvement:*
BB3—Total score: *Areas for improvement:*	**BB3—Total score:** *Areas for improvement:*	**BB3—Total score:** *Areas for improvement:*	**BB3—Total score:** *Areas for improvement:*	**BB3—Total score:** *Areas for improvement:*
BB4—Total score: *Areas for improvement:*	**BB4—Total score:** *Areas for improvement:*	**BB4—Total score:** *Areas for improvement:*	**BB4—Total score:** *Areas for improvement:*	**BB4—Total score:** *Areas for improvement:*
BB5—Total score: *Areas for improvement:*	**BB5—Total score:** *Areas for improvement:*	**BB5—Total score:** *Areas for improvement:*		
	BB6—Total score: *Areas for improvement:*	**BB6—Total score:** *Areas for improvement:*		
		BB7—Total score: *Areas for improvement:*		

PART TWO:
CAPACITY DEVELOPMENT ACTION PLANNING

Step 5: Prioritizing areas for improvement

Individual priorities:

- Each participant lists those five areas for improvement that matter the most to him / her. Only choose areas for improvement mentioned in the overall score sheet. You are free to choose from any building block and any core capability (i.e., there is no obligation to choose one from each core capability).

My personal priorities are:
1.
2.
3.
4.
5.

Group priorities:

From now on, everything that follows is done in group.

- Make an overview of all the individual priorities.
- Check for repetition. An area for improvement should appear only once in the overview.
- Check if certain areas for improvement that are in the overview need to be rephrased / regrouped. Overlap between areas for improvement should be avoided.

Overview of group priorities:
1.
2.
3.
4.
5.
6.
…

- Give a score to each area for improvement in the overview on the basis of its importance, impact and feasibility.

  Importance has to do with the sense of urgency (f.ex., due to changes in the context) as well as the effect that working on a certain area will have on the performance of the PDO (outputs, results, outcomes)

  Impact has to do with both potential influence and timeliness (sometimes, it may be too early to focus on certain areas for improvement, because attention needs to first be paid to rethinking the "basics" or laying the foundations).

  Feasibility has to do with whether or not it is doable to advance on a particular area for improvement within a specific period of time (f.ex., one year) and taking into account already existing capacity.

  The score key is explained below, in Tool 5.

Scoring is done in group. In other words, the score on the importance, impact and feasibility of a particular area for improvement is not the sum of individual scores. It is the group that decides collectively on the importance, impact and feasibility of each area for improvement in the overview.

TIP:

Investing in capacity is often about managing trade-offs. On the one hand, there are "quick wins" with smaller but immediate returns—the "sprints"—that can help ensure support for long-term capacity investments. On the other hand, there are initiatives that can promote broader and deeper change, but take longer to produce results and are therefore harder to 'sell'. These are the "marathons". If PDO personnel remain engaged and committed to the process, encouraged by the visible short-term successes of the sprints, then the balance can shift towards longer-term marathon investments over time.

When you consider the importance of working on a certain area for improvement, you may want to keep in mind that both sprints and marathons are worthwhile. Don't avoid those areas for improvement that probably involve a marathon in order to come to fruition. The longer you avoid them, the more energy it will take to get back "on track" … remember what was said when we talked about the lifecycle of an organization (p.8)!

On the other hand, make sure to work on at least some areas where "quick wins" can be expected … keeping up energy for change is one of the biggest challenges involved in capacity development. "Quick wins" can help you do so!

Based on: UNDP (2009: 38)[9]

- Calculate the total score of each area of improvement. This is the sum of the scores on importance, impact and feasibility.

- Rank the areas for improvement according to their total score. The higher the total score, the greater the priority attached to working on this area for improvement.

- It is up to the PDO to decide how many areas for improvement it wants to work on during the time to come. Much may depend on whether your priorities look more like sprints or more like marathons.

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[9] UNDP (2009). Capacity development: UNDP primer. [Online] Available at:
http://www.beta.undp.org/content/dam/aplaws/publication/en/publications/environment-energy/www-ee-library/climate-change/capacity-development-a-undp-primer/CDG_A%20UNDP%20Primer.pdf (last accessed: January 5, 2012).

Tool 5: Priority Score Sheet

Overview of areas for improvement	Importance [I₁]	Impact [I₂]	Feasibility [F]	Total score [I₁ + I₂ + F]	Ranking
1.					
2.					
3.					
4.					
5.					
6.					
…					

Importance		
High *5 points*	**Medium** *3 points*	**Low** *0 points*
Both PDO leadership and staff are convinced that this is an urgent area for improvement and/or that working on this area will improve the PDO's performance	Some of the PDO leadership and staff are convinced that this is an urgent area for improvement and/or that working on this area will improve the PDO's performance	PDO leadership and staff are not so convinced that this is an urgent area for improvement and/or that working on this area will improve the PDO's performance

Impact		
High *5 points*	**Medium** *3 points*	**Low** *0 points*
Will have a significant / visible influence on strengthening several of the PDO's core capabilities (over the next year)	Will have a significant / visible influence on strengthening one of the PDO's core capabilities (over the next year)	Will have hardly any significant / visible influence on strengthening the PDO's core capabilities (over the next year)

Feasibility		
High *5 points*	**Medium** *3 points*	**Low** *0 points*
Can definitely be implemented over the next year; requires resources that are actually available; is the responsibility of the PDO	Can probably be implemented over the next year; requires some extra resources that need to be attracted; is the responsibility of the PDO	Can't be implemen-ted over the next year; requires a lot of extra resources that need to be attracted; depends on many external factors

Step 6: Considering strategies

Once you have identified the areas for improvement that you want to work on (i.e., your priority areas for improvement), it is time to consider *how* you will approach capacity development.

The first strategy that usually comes to mind is formation and training. Formation and training are not the only means to develop capacity, though, and sometimes they are not the most appropriate. So before you start planning all kinds of training for the people in the PDO, take some time to consider other possible strategies as well.

Also pay attention to whether or not the necessary conditions exist to ensure that the results from capacity development efforts are sustainable.

1. Strategy one: formation and training

▪ *What are your options?*

Training in your own country or region:

Training could be provided by specialists, academic institutions, individual advisers and facilitators, …

Training in "the North":

Could be, but is not necessarily the best option—much depends on the topic and the provider; to be considered if training is not locally or regionally available.

Online training:

Access to training from the office, in the field or at home, so this avoids absence from PDO; can be combined with monitoring visits. Because there are no travel costs, this option could be more affordable.

Tailor-made training:

Tailor-made trainings cater to specific requests and clients' specific needs within their own work environment. The "gap" that may otherwise exist between training and practice is reduced.

▪ *What should you take into consideration?*

Formation and training aim at improving individual competences:

Impact on the capacity development of the PDO as a whole may be limited, though it is increased if there is an "enabling environment".

Tailor-made training can also cater towards groups—the whole PDO, or a few members of personnel. In this sense, what has been learned has a higher chance of becoming part of everyday practice.

Most useful if:

- o there is opportunity for application in concrete work situation—carefully check the topic of the training; in case of tailor-made trainings: make sure to set clear terms of reference
- o person remains at PDO x number of years after training

- PDO leadership get trained—they are more likely to enjoy sufficient to legitimacy to implement change and apply what they have learned; they usually have more influence over the PDO's change process than regular staff members

Take into account:

- quality of provider—check references!
- cost—travel & tuition; length & timing of absence from PDO
- personnel turnover—f.ex., rotation of SDB / FMA (PDO leadership); lay staff moving into other jobs

- ***Remember:***

A critical element in the success of any capacity development effort is the existence of an enabling environment—and this is especially true of training. By this, we mean that the PDO personnel that get the training must actually have the time, resources, legitimacy and encouragement to implement change and apply what they have learned.

All too often, people return from training, inspired to make a difference, only to be overcome by the weight of work or not being given the opportunity to put into practice what they learned. All kinds of things can conspire against the PDO benefitting from the training that was undertaken: the returning trainee is overtaken by back-log on work and feels compelled to go back to "business as usual"; trained individuals are not given the opportunity to practice what they have learnt; colleagues may be envious or suspicious of someone who had the opportunity to get training abroad and boycott that person's efforts to make a change; etc.

PDO leadership plays a crucial role in creating this "enabling environment", by ensuring that:

- individual staff member's workloads are manageable
- possible tensions and conflicts within the team are resolved
- training for staff members is part of a clear trajectory with opportunities for application in concrete work situations

- ***Do try this at home:***

Stay informed of training opportunities:

- Reliefweb provides an overview of trainings by theme and country
  → http://reliefweb.int/trainings

- Impact Alliance provides updates on a variety of trainings and conferences
  → http://www.impactalliance.org/ev_en.php

- MandE and My M&E publicize overviews of upcoming trainings on M&E
  → http://pub45.bravenet.com/forum/static/show.php?usernum=3858098953&frmid=8118&msgid=0
  → http://mymande.org/index.php?q=training_search&x=admin

Make use of online training opportunities:

- PM4Dev offers free online courses on project management
  → http://elearn.pm4dev.net/www/index.php

- FAO developed a free online course on knowledge sharing for development
  → http://www.imarkgroup.org/moduledescription_en.asp?id=138

and on using social media for development

→ http://www.imarkgroup.org/moduledescription_en.asp?id=109

2. Strategy two: peer-to-peer interaction and learning

▪ *What are your options?*

Look-and-learn visits and personnel exchanges:

- o between PDOs
- o between PDOs and other, similar organizations (f.ex., PDOs of other congregations, Southern NGOs, …)

Peer meetings:

- o at global seminars, Continental and Technical Meetings, …

Peer reviews:

- o between PDOs
- o between PDOs and other, similar organizations

▪ *What should you take into consideration?*

Most useful if:

- o "peers" are characterized by a similar work environment and there is a clear and good reason why a particular PDO or other, similar organization was visited, reviewed, … (f.ex., because that PDO or organization is known for a particular promising practice)
- o interaction is planned—there should be a clear purpose and both organizations involved should be aware of the purpose
- o interaction is focused—themes and topics are clearly identified and "matter" to the PDOs involved
- o non-committal is not an option—contributions are required; opportunities for mutual feedback are built-in
- o returnees find an "enabling environment"—make sure that what was learned at the other PDO or organization is not lost upon return; build in time for restitution

Take into account:

- o cost—travel; length and timing of absence from PDO

3. Strategy three: participation in networks

▪ *What are your options?*

Knowledge exchange networks and online forums

Action networks

- o around issues of importance to the PDO (f.ex., M&E; PCM; knowledge management; …)
- o around issues of importance to the different sectors of the Province that the PDO works with (f.ex., TVET / skills development; education; social communication, …)

- *What should you take into consideration?*

Most useful if:

- o themes and topics are clearly identified and "matter" to PDO
- o contribution to network activity is possible; commitment is required
- o there is an "obligation" and opportunity for sharing contacts, information, … from networks with colleagues inside the PDO

Take into account:

- o possible risk—networking "for personal use"; personalized instead of institutionalized networks

- *Do try this at home:*

In the area of M&E:

- o join M&E News email lists
  → http://mande.co.uk/join-email-list/

In the area of knowledge management:

- o join KM4Dev
  → http://www.km4dev.org/

In the area of increasing social impact:

- o join Impact Alliance
  → http://www.impactalliance.org/ev_en.php

In the area of TVET:

- o join UNEVOC e-Forum
  → http://www.unevoc.unesco.org/eforum.php

4. Strategy four: do it yourself … Yes, you can!

Taking matters into your own hands is one of the most powerful ways to develop capacity and positively transform your PDO. Ultimately, every organization has to make do with whatever is available. So make the most of what you already have!

A capacity self-assessment may bring to light many areas for improvement that are completely within your own reach … as long as you bring energy and enthusiasm to the table, and plan well enough so that you don't run out of breath half way through the changes you want to make.

Sometimes, it may be helpful to bring on board an external facilitator. S/he can help you "do it yourself", by bringing out the best in your team.

- *What are just some of your options?*

Visioning and missioning:

  o a shared visioning and missioning exercise can provide a useful framework for the PDO team to consider and develop a coherent, shared set of goals and values
  o by providing an opportunity for each team member to articulate and shape hopes and expectations for the PDO, a shared vision helps create a culture that values the full and effective participation of all of its members

Develop clarity about roles and functions—for the PDO as an organization, as well as for individual personnel:

  o clear roles help assess capacity development needs at individual level and improve collaboration among team members

Invest in a culture of listening and questioning:

  o use regular group or team meetings as a time to reflect on and learn from events and actions undertaken
  o encourage PDO staff to express themselves on issues that matter

Encourage on-the-job learning:

  o *structured on-the-job training*—f.ex., a more experienced colleague training a less experienced one to do a set task
  o *work shadowing*—f.ex., a less experienced colleague "following" a more experienced one for a set period of time and being coached by him / her
  o *self study / self-learning through manuals*

… and there are many more options!

- *What should you take into consideration?*

Timing and context "matter":

  o seize the opportunity of challenging events that push your PDO to innovate

Most useful if:

  o PDO leadership is committed to capacity development and acts as a role model

Take into account:

  o phenomenon of "change fatigue"—test the waters first, strengthen what you already have, because this will give you energy

- ***Do try these at home (self-learning through manuals):***

Develop a strategic plan for the PDO:
- o CIVICUS developed a useful toolkit for PDO leadership
  - → http://www.civicus.org/news-and-resources/toolkits/229-strategic-planning

Develop a financing strategy for the PDO:

- o CIVICUS developed a useful toolkit for PDO leadership
  - → http://www.civicus.org/news-and-resources/toolkits/266-developing-a-financing-strategy-

Improve financial management skills:

- o Mango guide and tools are great for PDO leadership
  - → http://www.mango.org.uk/Guide/FreeDownloads

Improve proposal writing skills:

- o fundsforngos.org and CIVICUS provide useful tips for PDO staff
  - → http://www.fundsforngos.org/how-to-write-proposal/
  - → http://www.civicus.org/news-and-resources/toolkits/268-writing-a-funding-proposal-

Improve budget development skills:

- o fundsforngos.org provides useful tips for PDO staff
  - → http://www.fundsforngos.org/category/budget-for-ngos/

Step 6: Considering strategies

- Go back to the areas for improvement that you decided to work on (i.e., your priority areas for improvement) and copy and paste them into the table below. For each priority area for improvement, decide which strategy/ies you will apply in order to make progress.

  If you have identified priority areas for improvement that seem to require a "marathon", then you need to think in terms of combined strategies (and longer timeframes).

- Explain for each area for improvement why something is your preferred option for capacity development. In your explanation, focus on two things:

  o Which benefits do you expect from using this strategy / these strategies?
  o Which possible risks or obstacles do you need to take into consideration? How will you deal with these?

Overview of priority areas for improvement	Preferred strategy/ies	Why this option?
1.		
2.		
3.		
4.		
5.		
6.		
…		

Step 7: Operational planning

- For each priority area for improvement, identify:

  o Expected outcomes--What you want to achieve?

  The considerations mentioned under each of the building blocks in the five capacity self-assessment modules may help you formulate what you hope to achieve.

  o Strategy/ies—How do we do it? How will we approach this area for improvement?

  o Action points—What exactly do we need to do? Be as concrete as possible. It will help you get a better sense of timing and cost.

  o Person responsible—Who will take the lead on getting this done? Select people who are mandated / have the necessary legitimacy to take the lead on a particular area for improvement. Also identify who will support him / her.

  o Timeframe—When will we do it? How long do we expect it to take?

  o Estimated cost

Tool:

Priority area for improvement *What do we want to work on?*	Expected outcomes *What do we want to achieve?*	Strategy/ies *How do we do it?*	Action points *What exactly do we need to do?*	Person responsible *Who will take the lead in getting this done?*	Timeframe *When will we do it?*	Estimated cost

Glossary

TERMS	DEFINITIONS
Action learning	Learning from experience.
Capacity	The ability of individuals, organizations, institutions or societies to perform functions, solve problems, and set and achieve objectives in a sustainable manner.
Capacity assets	Refers to capacity that exist in a given unit, organization or system that can be strengthened, built up on and optimized.
Capacity building	A purposeful, external intervention to strengthen capacity over time. A range of different players provide capacity building services: donors, academic institutions, individual organizational development (OD) advisers and facilitators, specialized consulting firms, etc. The term "capacity building" is defined differently by different sources. To avoid confusion, VIA Don Bosco prefers to use "supporting capacity development" instead of "capacity building".
Capacity development	A deliberate process whereby people, organizations or society as a whole create, strengthen and maintain capacity over time.
Capacity self-assessment	Refers to a self-analysis of existing capacity; offers a systematic way of gathering critical insights into capacity development needs.
Competence	Combination of skill, attitude and values.
Enabling environment	In this guide, the phrase refers to the organizational context within which PDO personnel function and that facilitates or hampers their performance.
Evaluation	A time-bound exercise that attempts to assess systematically and objectively the relevance, performance and success of ongoing and completed programs and projects.
Facilitator	Someone who helps a group of people understand their common goals and assists them to plan to achieve them without taking a particular position in the discussion.
Knowledge Management	Development of new knowledge or absorption of existing knowledge, its organization and diffusion with the overall aim of optimizing results.
Lessons learned	Learning from experience that is applicable in a generic situation rather than a specific circumstance.
Local center (LC)	SDB / FMA organization that works directly towards ultimate beneficiaries (marginalized groups / youth)—f.ex., street children's project, TVET center, college, etc. The local SDB / FMA community works around one or more local centers.
Monitoring	A continuing function that aims primarily to provide program or project management and the main stakeholders of an ongoing program or project with early indications of progress or lack thereof in the achievement of program or project results and objectives. Often used in combination with "Evaluation" (M&E).

Organization	Organizations are made up of groups of individuals bound together by some common purpose to achieve certain objectives.
PDO leadership	Refers to PDO Director (may or may not be Provincial Economer) / PDO Coordinator / PDO Board of Directors or Governing Board.
PDO personnel	Refers to PDO leadership + PDO staff.
PDO staff / staff members	Refers to "regular" employees, including voluntary employees.
Peer review	Evaluation or review of one's performance or quality of (a particular aspect of) one's work by one's equals. In capacity development, the purpose of peer review is to learn from one another's practice.
Resilience	Ability of an organization to sustain itself and carry out its mission in a situation of adversity (f.ex., the loss of a key capacity asset; disasters, …) *and* to respond to and manage planned and unplanned change or opportunities that present themselves.
Skill	Acquired and practiced ability to carry out competently a task or job.
Stakeholder	An individual, group or organization with an interest or concern in the proposals made by / the work done by an organization.
Training	Systematic educative process by which one learns new competences.
Transparency	Refers to a process by which reliable, timely information about existing conditions, decisions and actions relating to the activities of the organization is made accessible, visible and understandable.

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