

# Partner Capacity Assessment (PCA)



# United Mission to Nepal (UMN)

## Partner Capacity Assessment (PCA)

### Questionnaire for measuring Organisational Capacity of NGOs

For the purpose of measuring OD impact and evaluating of partnerships, the following capacity assessment questionnaire has been developed. These questions are directly related to the OD strategic plan outputs and Partnership Exit Strategy criteria. The questions are most appropriate for use with NGO partners while a separate set of questions are designed for schools, cooperatives and community learning centres.

#### When can this assessment be done?

This assessment will form an important part of Participatory Organisational Technical Assessment and Planning (POTAP), which is conducted between the time period of Potential Partnership and Partnership Agreement. The data from this assessment will provide inputs for OD action planning and also serve as a baseline for measurement of change in organisational capacity areas over time. It will also be part of setting the objectives for the partnership as guided by the exit strategy process.

This assessment will be conducted at different intervals of time. The first one at the time of POTAP for establishing a baseline, then every year as part of their annual review and subsequent planning. The final one towards the end of the partnership as an evaluation tool which will form a part of the Exit Strategy.

#### How to use this assessment?

There are specific questions under each output covering different aspects of the OD strategic plan output and milestones. Each question has four different options and each respondent or group of respondents should choose only one option for each question that describes most closely the situation of their organisation.

When completing the assessment please **tick only the one that describes your organisation best.**

It is recommended that the following categories of people participate as respondents:

1. Executive committee members: Chairperson, Vice Chairperson, Secretary and Treasurer (mandatory) and 50% members selected randomly
2. General members: 20% or 6 which ever is less
3. Target Group representatives: at least 5 persons
4. Advisors: If relevant and as needed
5. Staff: at least 5 if there are more staff members

It is recommended that women should make up at least 33% of the respondents.

#### Process and methods:

**Step 1:** Welcome and introduction of participants

**Step 2:** Explain/clarify what PCA is, its contents and rationale

**Step 3:** Explain the overall modality of PCA, how this is going to be conducted, and demonstrate one or two indicators as an example.

**Step 4:** Divide the participants into small groups and provide each of them with a copy of the questionnaire.

- Depending on the number of participants present, form up to 4 small groups. The grouping would follow the different categories of people such as key EC members, other EC members, general members and the target group representatives.
- Staff can join the EC members group or can form a separate group if there are sufficient persons i.e. up to 4-6.
- Advisors can join the group of chief executive committee as they generally advise the EC impacting the overall functioning of the organisation.
- Allow at least 3 hours for each group to answer the questions.
- Arrange for a facilitator in each group if possible. Otherwise one facilitator can oversee two groups.

*(Notes for the facilitator: Make sure that the participants have clearly understood the questions and the options mentioned in the questionnaire. Unless they understand the question and given options, it is unlikely that they will choose the option that best describes their organisational status. Do not facilitate to choose 'this' or 'that'. If the participants are unable to decide the option, it is better not to choose at all. If the situation occurs when only 1 or 2 members understand the question and options, request them to explain to the other members. Sometimes the*

discussion may prolong the time period and may create a conflict. Ensure that relationships are kept at a good level rather than continuing the discussion.

**Step 5: Plenary discussion and consensus**

All the participants return to the meeting hall and arrange that the small group members sit together. Such seating arrangements helps the participants to present their ideas as a group confidently in the plenary. Remember!! Constructive criticism is important for organisational change.

The facilitator initiates the discussion by writing the options chosen by each group on a board/newsprint. Then look at the consensus building under each question/indicator. This consensus should be realistic rather than a majority decision. Give opportunity for those who choose contrasting options to explain why their group has chosen that option. For example if one group has chosen the category 'a' while the other has chosen category 'd', then each should explain their choice.

(Note for facilitator: Before starting the group work, the facilitator needs to prepare a format using the table below. This can be done on the black/white board or a newsprint. After finishing the group work, allow them to continue sitting together. Explain that consensus building is the best way to reach a conclusion. Avoid decisions made using the principle of majority. For example if in a particular indicator, three groups have chosen option 'c' and one group has chosen option 'a', then do not decide that the option 'c' best describes the organisation. Give opportunity to explain why the other group has chosen option 'a'. Sometimes group discussion may go on for a long time without a decision being made. The facilitator who has general overview of the organisation, can intervene with his/her opinion and facilitate to make a decision. There can be a situation where all the participants agree on a particular option but the real situation is different than what is agreed by all the participants. As an OD practitioner, you have to assist them in the understanding the reality. The intension of PCA is to show the real situation of the organisation. This affects future planning and interpretation of the results. So in this situation, the facilitator has to remind them to express his/her own views which can be a clue for making a decision. When one facilitator is facilitating, the other facilitator has to note down the PCA results and important points of of the discussion.

**Formate for the plenary discussion:**

Indicator no.	Score					Main Reasons
	Group1	Group 2	Group 3	Group 4	Consensus	

The data obtained from this assessment will be processed in spreadsheet format under 7 different groups. These are Management/governance, Networking, Sustainability, Local Resources Mobilisation, Transparency/Accountability, Leadership and Documentation. The data will be visualised in a spider web chart for reporting and interpretation. The chart can be pasted in the office of the partner organisation using cardboard/ brown paper or other locally available materials such as *Nanglo*.

Organisation's Name: .....		Reg. No. ....	
Establish Date: .....		Affiliated No. ....	
Membership Detail:		Total No. .... Female ..... Male..... Ethnic..... Dalit..... Madheshi.....	
Executive committee detail:		Total No. .... Female ..... Male..... Ethnic..... Dalit..... Madheshi.....	
Potential Partnership Date with UMN: .....		Partnership Date with UMN: .....	
Partner Capacity Assessment Date: .....		Name of facilitator: .....	
Total No. of Participants	Executive Committee: ..... General Members: ..... Advisors: ..... Staff: ..... Target Group: ....		
	Female: ..... Male: ..... Ethnic: ..... Dalit: ..... Madheshi: .....		

## 1. RULE OF LAW

### 101. How far is the organisation operating in the existing legal framework of the government?

- A The organisation is registered only with local authorities.
- B Is registered with local authorities and also affiliated with Social Welfare Council (SWC)
- C Is registered with local authorities, affiliated to SWC and also acquired either PAN number or tax exemption certificate.
- D Is registered with local authorities, affiliated to SWC and also acquired PAN number and tax exemption certificate.


### 102. Executive Committee (EC) composition

- A EC is composed of the most of the family members and active party politicians
- B EC is composed of either of close family members and active party politicians
- C EC is composed of some relatives<sup>1</sup>
- D EC is composed of community members/ social workers who desire to help in social development.


### 103. Power separation

- A Most of the members of the EC (more than 51%) are working as staff.
- B Some of the members of executive committee (less than 50%) are working as staff.
- C Only one or two EC are working as staff.
- D None of EC are working as staff.


### 104. How have been the General Assembly (GA) meetings been functioning?

- A The GA has not been held since last year.
- B The GA is held just to fulfill the formality, therefore members are dissatisfied with the process.
- C The GA is held annually but there is limited discussion on the subject matter
- D The GA is held annually in an open environment discussing the annual plans & budget, reports and other organisational issues with consensus decision making.


### 105. To what extent are written rules and policies used by the organisation?

- A There are no written policies except the constitution.
- B The organisation has decided to formulate some policies.
- C All required policies (at least financial and personnel) were developed and now being implemented.
- D Essential policies are developed, implemented and amended as per need.


### 106 Who ratifies the policies, plans and programs in the organisation?

- A Chairperson or staff head/ or both of them
- B Some of the EC members/or staff
- C Executive Committee
- D General Assembly


### 107 Who ratifies the appointment of account auditor?

- A Chairperson or Staff head/ or both

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1 Relatives include close family relatives and extended family relatives

- B Some of the EC members
- C Executive Committee
- D General Assembly


**108 How staff are managed?**

- A No staff are recruited in the organisation
- B Staff are being appointed just verbally or they are just given the contract letter signed only by employee
- C Contract paper/appointment letter and job description are signed by duo(staff and organisation)
- D Appointment letter, job description and performance appraisal system have directed the staff management process of the organisation.


**109 Do organisation follow the tax rules?**

- A No, organisation doesn't have any information about it
- B organisation has information but never followed
- C Yes, but not fully followed
- D As per the rule of Nepal government, organisation is deducting tax on staff salary, rent, consultation fee and depositing in revenue office


**110 Tenure of leadership**

- A Same figures are repeatedly working in top positions (chairperson, vice- chairperson, secretary and treasurer) since the establishment of the organisation
- B Same figures are in all or at least three top positions from last three tenures
- C At least two people have been working in top positions from last two tenures
- D There is the policy which describes that no one will work more than two tenures in the top positions and organisation is following it.


**2. TRANSPARENCY AND ACCOUNTABILITY**

**201. To what extent stakeholders are involved in planning process?**

- A Only chairperson or secretary or both of them are involved.
- B Only the key EC members (chairperson/vice chairperson, secretary and treasurer) and the key staff are involved and the plan is presented at District Development Committee (DDC).
- C All EC members, staff and some general members are involved and plan is presented at DDC.
- D Concerned stakeholders and organisations (EC, general members, target groups and key stakeholders) are involved and plan is presented at DDC.


**202 To what extent are organisational budget and expenditure are transparent?**

- A Only chairperson and treasurer know about the budget and expenditure.
- B All EC members know the budget and expenditure status.
- C Most of the ordinary members know about the budget and expenditure.
- D All stakeholders (ordinary members, key stakeholders and target groups) know about the budget and expenditure of the organisation.


**203. To what extent are the organisational activities are known to others?**

- A Only EC members can explain about the organisation and its activities.
- B Most of the general members can explain about the organisation and its activities.


- C Most of the general members and selected target group members can explain about the organisation and its activities.
- D Most of the general members, target groups and key stakeholders can explain about the organisation and its activities.


**204. How clearly are the target groups and geographical areas are defined by organisation?**

- A Target groups or working areas are not defined.
- B A written definition of one exists (either target group or working areas).
- C Both are defined in written form but members do not know about it.
- D Target group and working areas are clearly defined and most of the general members have clear understanding on it.


**205. Does the organisation prepare the income and expenditure statements and present to its stakeholders?**

- A Not prepared yet.
- B Prepares occasionally or only when someone asks for
- C Prepares on a monthly basis.
- D Prepares regularly and also makes it available to concerned stakeholders.


**206. What method is used to demonstrate transparency among stakeholders?**

- A No method exists
- B Annual report is distributed.
- C Semi annual/ annual review meeting is organised.
- D Social audit or similar kind of other event(s) is organised annually.


**207. To what extent is staff selection and recruitment process open and transparent?**

- A No vacancy has been announced for staff recruitment and staff are not recruited by open competition.
- B Though vacancy was open for all but nepotism and political pressure guided the selection process.
- C Vacancy was opened for all but EC members put pressure to select their own people.
- D Staff were selected through open competition based on knowledge, skill and experience demonstrated.


**208. Does the organisation submit its report to key stakeholders?**

- A There is no tradition of preparing report.
- B Prepares report but does not submit to anyone.
- C Prepares report and make available to the concerned body or stakeholders when asked.
- D Submits monthly or quarterly report (or as per the decision and need of DDC) to DDC and other concerned line agencies. Likewise, target groups are informed regularly (at least twice a year) about the program progress and its status, and donor reporting is held as per the agreement.


**3. PARTICIPATION AND LOCAL RESOURCE**

**301. Community mobilization/contribution (Based on last year)**

- A Community contribution was less than 5% of total program budget
- B Community contribution was 6-10% of total program budget
- C Community Contribution was 11-15% of total budget
- D Community contribution was more than 15% of total budget


**302. Local Resource mobilization**

- A Less than 5% support of total program budget (financial, physical and human) from local stakeholders like DDC, VDC and municipality
- B 6-10% support of total program budget (financial, physical and human) from local stakeholders like DDC, VDC and municipality
- C 11-15% support of total program budget ((financial, physical and human) from local stakeholders like DDC, VDC and municipality.
- D More than 15% support of total budget (financial, physical and human) from local stakeholders like DDC, VDC and municipality.


**303 Volunteer service within organisation**

- A Less than 5% support of total organisational and program budget (all kind of support financial, physical and human) provided by its members.
- B 6-10% support of total organisational and program budget (all kind of support financial, physical and human) provided by its members.
- C 11-15% support of total organisational and program budget (all kind of support financial, physical and human) provided by its members.
- D More than 15% support of total organisational and program budget (all kind of support financial, physical and human) provided by its members.


**304. To what extent is organisation able to address the real needs of target groups?**

- A Staff and EC themselves prioritize the real needs of target groups.
- B Organisation holds a limited consultation with target groups while making plans and programmes.
- C Organisation makes plans identifying community needs.
- D Organisation adopts participatory process of identifying needs and incorporates the views or interests of target beneficiaries while making plans and programmes.


**305. Membership**

- A Open general membership is not announced.
- B General members are listed but member receipt is not provided.
- C Membership receipt is being provided but there is no system of distributing ID cards.
- D General members are more than 25 and everyone has got membership receipt and ID cards.


**4. LEADERSHIP**

**4.1 Responsive**

**411. To what extent there is common understanding of organisational vision, mission, goal and objectives**

- A VMGO has not been developed except writing objectives in constitution.
- B Some of the key EC members have prepared VMGOs of the organisation.
- C Most of the EC members have common understanding of its VMGOs.
- D Most of the general members also have common understanding of VMGOs.


**412. To what extent have activities organisation's achieved its goal and objectives**

- A The organisation has no remarkable progress towards its goal and objectives.
- B The organisation can show some evidences of progress achieving its goal and objectives.
- C The organisation can show many evidences of progress achieving its goal and objectives.


D Organisational documentation and activities can show that all its goal and objectives have been achieved.

**413. How do the leaders demonstrate their commitment towards the organisation?**

A There is no such organisational values or other written documents that demonstrate the organisation's identity.

B The organisational values are formulated but only some leaders follow it.

C The organisational values are developed in written form and most of the leaders follow it.

D The organisational values have become guiding principle for overall functioning of the organisation.

**414. To what extent does organisation success to maintain its identity and purpose?**

A The organisation implements any activities as and when outsiders request them and provide resources.

B Leaders are aware of their organisational identity but fail to make decisions accordingly.

C Leaders are concerned and committed in actions and decisions to maintain their organisational identity.

D All planning and activities are based on organisational identity.

**4.2 Democratic**

**421. How democratic is the EC election process?**

A Never thought for open election or never did it before.

B Members are putting pressure for open election but EC remains salient on it.

C Open election held but most of the members did not participate so most of them are disagree with its validity.

D The organisation has been conducting free and fair election for all posts and all members have been independently participated.

**422. How far is the organisation success in developing its second line leadership?**

A The organisation is run by one person (such as Chairperson or Secretary).

B The organisation is run by one person with consultation from key EC members.

C The organisation is taking some initiations to develop second line leadership.

D Second line leadership is developed and is able to take over the responsibility to function organisation as per need.

**423. Who takes the important organisational decisions?**

A Only chairperson or Secretary.

B Key Executive Committee (EC) members.

C Executive Committee (EC)

D EC, consulting with key staff, target groups and other stakeholders.

**4.3 Inclusive**

**431. To what extent are the key organisational structures inclusive such as EC?**

A The key structures are composed of 'upper caste' and/or males only.

B The key structures are composed of women (at least 33%) or dalits (proportionate to population) or madhesi (proportionate to population) (at least one above them are participated in EC).

C The key structures are composed of women (at least 33%) or dalits (proportionate to population) or madhesi (proportionate to population) (at least two above them are participated in EC).



D There is proportionate participation of gender, caste and target group (at least one) in the key structures.

**432. How is the level of women's participation in EC functioning?**

- A They do not keep interest in organisational activities.
- B They attend the meeting if they are invited but they do not actively participate in discussions.
- C They regularly attend the meeting and actively participate the discussions.
- D They attend and actively participate in the meeting and take initiatives to implement the decisions being made.

**433. To what extent are the staff 's composition and staff appointments inclusive?**

- A The staff are 'upper caste' and/or males only.
- B The staff includes either at least 33% women or dalits (proportionate to population) or madhesi (appropriate to Terai)
- C The staff includes 33% women or dalits (proportionate to population) or madhesi (appropriate to Terai) (at least two types of inclusion out of three).
- D There is proportionate participation of gender and caste/ethnicity among staff.

**434. Equity**

- A While making plan, the organisation does not consider gender sensitivity and equity
- B While making plan, organisation considers gender sensitivity and equity
- C While making plan organisation considers children, gender sensitivity and equity
- D The organisation makes equitable programmes considering the needs and specific issues of children, gender and marginalised people

**5. EFFICIENCY AND EFFECTIVENESS**

**501. To what extent do the EC members fulfill their responsibility?**

- A Role and responsibility is just limited in constitution.
- B Role and responsibility is written in constitution but need to explain and discuss more.
- C All EC members are given their roles and responsibilities in written form but few of them follow it.
- D All EC members are clearly understood about their role and responsibility and fulfilling accordingly.

**502. How the EC meeting have been functioning?**

- A No EC meeting has been held from last 6 months
- B EC meetings are held just to fulfill the formality
- C EC meetings are held regularly (bimonthly, at least 6 times in a year) but lacks open discussion on agenda items.
- D EC meetings take place regularly and decisions are made as per the common consensus followed by open discussion.

**503. To what extent have staff been given the opportunity for their professional development? (Divide all the number of trainings, workshops and professional development activities participated by staff by total number of staff)**

- A No staff had participated professional development activities last year.
- B The staff had participated one activity in average last year.
- C The staff had participated 2 activities in average last year as per the professional development plan.

D Last year, staff had participated 3 activities in average or more than that as per the professional development plan.

**504. How is the annual planing and budgeting carried out within the organisation?**

- A There is no system of making plan and budget in the organisation.
- B General framework of planning and budgeting is prepared but not adhered or referred to during implementation.
- C Annual plan and budget are prepared and implemented but there id no system of review and revision periodically.
- D Annual plan and budget are prepared and implemented along with its half yearly review and revision.

  
  
  

**505. To what extent are monitoring and evaluation process developed and implemented?**

- A The organisation has not developed any monitoring and evaluation process<sup>2</sup> yet.
- B The organisation has developed monitoring and evaluation process but it is less followed.
- C The organisation has developed and implemented monitoring and evaluation process and incorporated findings in its report.
- D The organisation has formed monitoring committee, developed and implemented M&E process and incorporated its findings while making plans.

  
  
  

**506. To what extent are last year's activities completed?**

- A Less than 60% planned activities have been completed.
- B 61-70% planned activities have been completed.
- C 71-80% planned activities have been completed.
- D More than 80% planned activities have been completed.

  
  
  
  

**507. How much amount has been spent out from last years budget?**

- A Less than 60%
- B 61-70%
- C 71-80%
- D More than 80%

  
  
  

**508. To what extent has the organisation received reward and appreciation from its stakeholders?**

- A The organisation has not received any reward/appreciation yet.
- B The organisation has only received verbal reward/appreciation from stakeholders.
- C The organisation has received appreciation letter and/ or cash amount from stakeholders for its good deeds.
- D The organisation has received appreciation letter and/ or cash amount from more than two stakeholders.

  
  
  

**509. Is the organisation able to manage risks and conflicts?**

- A Does not have experience or skills of managing risks and conflicts.
- B Has some skills and experiences of managing risks and conflicts.
- C Has good skills and experiences and also managing risks and conflicts.
- D The organisation has been mitigating risks and conflicts anticipating and analysing beforehand.

  
  
  

2 A plan or framework that describes what to monitor, when to monitor, how to monitor and who is (are) responsible.

## 6. FINANCIAL MANAGEMENT

### 6.1 Financial Management

#### 611. To what extent is organisation's financial management updated and clear?

- A No accounts have been maintained.
- B A single entry book keeping is used recording incomes and expenditure separately.
- C A double entry book keeping system is used but is not clear and updated.
- D Up-to-date and clear accounts are maintained using double entry book keeping system and monthly financial statements prepared.


#### 612. Does the organisation prepare trial balance?

- A No knowledge about trial balance.
- B Has knowledge about it but never prepared so far.
- C Prepares occasionally only or when asked for it.
- D Is being prepared on monthly basis.


#### 613. Does the organisation carry out cash verification?

- A No knowledge about cash verification.
- B Has knowledge about it but never carried out.
- C Yes, but only when asked for and with external help.
- D Yes, on a monthly basis and without any external help.


#### 614. Does the organisation follow accrual basis accounting?

- A No knowledge about accrual basis accounting.
- B The organisation has heard about it but does not know how to do it.
- C Yes, but need help.
- D Yes, without needing any help.


#### 615. Does a proper advance system exists in the organisation?

- A No
- B The organisation has felt its need but nothing has been done on it.
- C There is an advance system exists but is not well implemented.
- D Yes, and it is being fully implemented.


#### 616. Does the organisation undertake budget variance analysis?

- A No, the organisation knows nothing about it.
- B The organisation has thought about it but is not carried out yet.
- C Budget variance analysis is made but not discussed.
- D Budget variances are discussed by the EC, causes of variances investigated and appropriate actions taken.


**6.2 Financial statement and recording system**

**621. Can the organisation prepare financial statements?**

- A No, not at all.
- B Yes, but needs external help.
- C Can only prepare income and expenditure statement.
- D Can prepare all financial statements including balance sheet without any external help.


**622. Does a good record system exist in the organisation?**

- A No bills or vouchers are kept.
- B Only bills and vouchers are kept.
- C Only some transactions have vouchers with supporting documents like bills, receipts.
- D All transactions are maintained clearly with voucher number.


**623. Does the organisation carry out bank reconciliation?**

- A No, never heard about it.
- B Has heard about it but never carried out.
- C Yes, but only when asked for it and with external help.
- D Yes, on a regular basis (monthly) and without needing any external help.


**624. How are the fixed assets of the organisation managed?**

- A There is no system of recording fixed assets.
- B Fixed assets are recorded in register but no depreciation is deducted.
- C The organisation has realised the need of having proper recording system, but no action is taken forward.
- D Fixed assets are coded and recorded in a register systematically and depreciation is charged according to the rates defined.


**625. Is there any system of recording kind contribution?**

- A No system exists.
- B Discussions has taken place to record but nothing has been done yet.
- C Yes, but needs external support.
- D Yes, and without needing any external help.


**6.3 Account Audit**

**631. How is the internal audit carried out in the organisation?**

- A Internal audits have not been held since last year.
- B Internal audits have been carried out regularly but the recommendations have not been implemented fully.
- C Most of the recommendations given by the internal audits have been implemented.
- D All the recommendations given by the internal audits have been implemented..


**632. How is the external audit carried out in the organisation?**

- A External audit has not been held since last year.

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- B External audit has been carried out regularly but the recommendations have not been implemented fully.
- C Most of the recommendations given by the external audit have been implemented.
- D All the recommendations given by the external audit have been implemented..


**7. SUSTAINABILITY**

**701. How far is the organisation able to collect its own resources?**

- A The organisation has no ability to write its own proposals.
- B Some of the EC members can write proposals with external assistance.
- C The organisation has written and submitted proposals without external assistance.
- D The organisation has prepared proposals and accessed external funds independently.


**702. Does the organisation maintain a database of potential and actual resource organisations?**

- A There is no database or list of organisations that may provide resources.
- B A database of a few local organisations is initiated but not updated.
- C A database of local and national organisations maintained but no frequent contact is taking place.
- D A database is in place and is being used for access of resources.


**703. How diversified are the organisation's sources of funding?**

- A The organisation has no funding base at all.
- B The organisation has access to at least one or two funding sources locally or externally (e.g. VDCs, government , INGOs in the district)
- C The organisation has access to more than two funding sources locally or externally (e.g. VDCs, government , I/NGOs)
- D The organisation has access to diversified bases of funding including DDC/VDCs, GoN line agencies, INGOs etc.


**704. To what extent has the organisation sufficient professional competencies?**

- A Members/staff are unable to provide any technical expertise to implement to carry out tasks.
- B External resource person is hired to carry out key tasks, but other activities are conducted by member/ staff themselves.
- C External resource person is hired to carry out certain tasks only, but all other activities are conducted by member/ staff themselves.
- D Member/staff are technically competent to implement planned activities.


**705. To what extent has the organisation provided technical support to others?**

- A Members/staff are unable to provide technical support to others or such support is not demanded.
- B Members/staff served as resource persons for three or less than three times during the last year.
- C Members/staff served as resource persons for three to six times during the last year.
- D Members/staff served as resource persons for more than six times during the last year.


**706. To what extent has the organisation prepared plans for the future?**

- A No specific thought exists for the future.
- B The organisation has decided to develop a strategic plan.


- C A strategic plan is prepared but is not implemented or utilised.
- D A strategic plan is developed; and all the plans are prepared and implemented accordingly.


**707. How far is the organisation aware to provide sustainable service to its target groups?**

- A Leaders have not thought about it.
- B Leaders show interests but superficially to uplift the life standard of their target groups.
- C The organisation has its long term vision and also plans to uplift the life standard of target groups but is not fully applied.
- D The organisation has its long term vision and also plans to uplift the life standard of target groups but is fully applied.


**8. NETWORKING**

**801. How far is the organisation affiliated with relevant networks?**

- A The organisation is not affiliated with any networks.
- B The organisation is in the process of affiliating in one or more local networks.
- C The organisation is a member of a local as well as of one or more country's regional networks.
- D The organisation is affiliated with one or more local, regional and national networks. *(For UMN's national partners, it means international networks)*


**802. How is the level or quality of participation within these networks?**

- A Network is maintained informally or through occasional renewal of membership.
- B Network is maintained only through the renewal of general membership.
- C Representatives of the organisation serve as EC members of one or more networks.
- D Representatives of the organisation serve as key EC members of one or more networks.


**803. How far is the organisation taking benefit from networks?**

- A No benefits at all.
- B Information like best practices, learning and experiences are shared.
- C The organisation has received either a technical or a financial support from networks.
- D The organisation has received both financial and technical support from networks.


**804. Information and communication**

- A Telephone facility is available.
- B Any two of them is available out of telephone, postal service and email.
- C Telephone, postal service and email are all available
- D Telephone, postal service, email and website are all available.


**805. Website**

- A The organisation does not have its website.
- B Website is developed but not updated since last year.
- C Website is being updated occasionally.
- D Website is being updated regularly (minimum twice a year).


## 9. LEARNING AND DOCUMENTATION

### 901. How is the organisation in its reporting and documentation?

- A There is not skill in writing reports (progress report, case study and best practices).
- B Reports, experiences and case studies have been documented but not shared to others.
- C Reports, experiences and case studies have been documented, published and shared within organisation.
- D Reports, experiences and case studies shared or disseminated in and outside the organisation and also published in local media.


### 902. Discussion about experiences and learning

- A Discussions are rarely held about experience and learning.
- B A discussions is held once a year to discuss about experience and learning.
- C Discussions are held once in four months.
- D Discussions are held once in four months about experience and learning which is documented in written form and used while making plans and programmes


### 903. Has the organisation participated in or organised any learning and sharing forum in the last year?

- A The organisation did not organise any meeting for learning and sharing purpose.
- B The organisation either invited others or was invited to participate for learning and sharing.
- C The organisation invited others and was also invited to participate for learning and sharing.
- D The organisation invited others and was also invited to participate for at least two learning and sharing meetings.


### 904. Does the computerised documentation system exists in the organisation?

- A No, lacks such skills.
- B The organisation has a plan to learn about it.
- C Yes, but needs external help.
- D Yes, and without needing any external help.


### 905. How the organisational documents are managed?

- A There is no office so far so documents and other goods are kept in one of the EC member's house.
- B There is an office but office items are not kept in orderly manner.
- C Office documents and other goods are managed properly but it takes time to outsiders to observe in given time, (no catalogue system).
- D Office documents and other items are managed properly which can be found by outsider in given time, (catalogue system).


### 906. Meeting Minutes

- A Meeting takes place with discussion but decisions are rarely documented.
- B Minute book is maintained to document meeting minutes but decisions are written if and only needed.
- C All decisions are written in same minute book. (*Other minute book can be used when the page finishes in the existing one*)
- D All decisions are written in same minute book and is also typed in computer. (*If there is a computer*)
