OCD GUIDE



Photo: Zacharias Abubker/Save the Children

ORGANISATIONAL CAPACITY DEVELOPMENT

for Civil Society Organisations and Networks

Save the Children

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With contributions and lessons learnt from Save the Children´s country and regional offices, and civil society partners

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1. INTRODUCTION

Why does Save the Children support Civil Society Organisations?

Save the Children wants to uphold the rights and achieve long-lasting change for children. We believe that the fulfilment of child rights can only be achieved sustainably in a context where children are supported by strong, diversified and representative civil society organisations (CSOs) and networks. Children also have the right to have their interests represented through their organisations.

In the past 20 years, we have seen a democratic backslide and shrinking space for CSOs. This negative trend has an impact on all human and child rights actors. Well-functioning and strong civil society actors have greater chances to withstand restrictive environments. Safeguarding civic space is therefore an essential part of our work.

We believe that civil society plays a key role in defending and promoting children's rights.

Providing OCD support is one of our main strategies for strengthening civil society organisations, including those led by children, as actors in their own right.

Why does Save the Children support Organisational Capacity Development?

Organisational Capacity Development (OCD) is part of Save the Children´s contribution to the fulfilment of the Istanbul Principles on Development Effectiveness[1] and the Localisation Agenda.[2]

By providing OCD[3] support to our civil society partners, we want to contribute to the development of sustainable CSOs with strong organisational identities that contribute to democratic development by promoting and defending human and child rights and responding to rights violations and humanitarian needs. In practice, this means organisations with well-functioning systems that ensure that they can be kept accountable, attract funding, maintain quality programming, adjust to changes in context, and better manage risks over time.

How has this guide been developed?

This guide has been developed as part of a package of resources for Save the Children staff who facilitates OCD of civil society organisations. It builds on more than 20 years of experience in providing OCD support to CSOs in many countries across the world. The guide has been updated based on feedback from CSO partners and Save the Children staff, dedicated communities of practice, and an external evaluation published in 2021[4].

[1] The Istanbul Principles on development effectiveness | Global Partnership for Effective Development Co-operation

[2] Localisation agenda refers to development towards more locally led humanitarian aid and development programming.

[3] Sometimes called Institutional Capacity Strengthening

[4] Evaluation of Save the Children's Capacity Strengthening of Civil Society Organisations Through Save the Children Sweden's Global CSO Programme, 2017-2021

What does the OCD resource package include?

This guide is accompanied by several resources—all available at Save the Children's Resource Centre. *See the list of resources with links at the end of the guide*.

- OCD Slide Deck (2022)
- Interactive and playful OCA exercises (2022)
- Organisational Capacity Assessment Tool for Civil Society Organisations (2022)
- Organisational Capacity Assessment Tool for Civil Society Networks (2022)
- Organisational Capacity Assessment Tool for Child-led Organisations and Networks, "Spider Tool" (2005)
- Organisational Capacity Development Plan Template (2022)
- Communication Brief for Partners (2022)
- Communication Brief for Donors (2022)

2. UNDERSTANDING OCD

What is capacity?

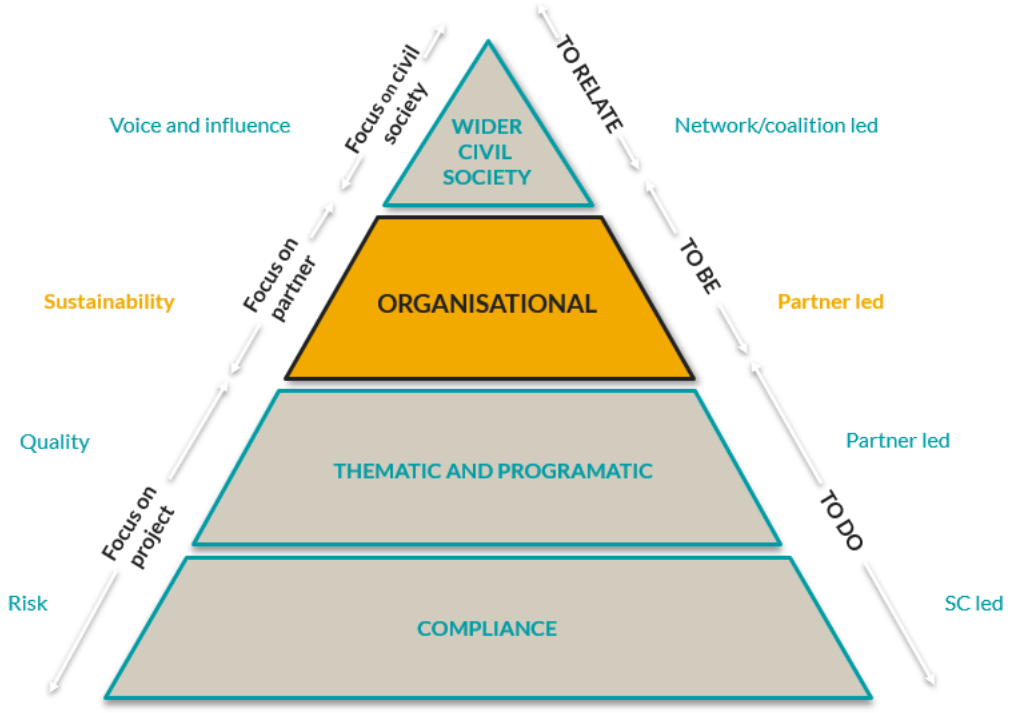
Capacity can be understood on different levels; at the individual level, it can include experience, knowledge, technical skills, energy, motivation, and influence. At the organisational level, it can include organisational identity and culture, internal policies, procedures, systems, and structures that allow an organisation to operate and that provide the framework for staff within which they collaborate to achieve organisational goals.

The way international actors have looked upon local capacity has been debated over recent years. As definitions of capacity often tend to be subjective and defined by those in control of resources, there are reasons to self-critically reflect on for instance; how we define and value capacity, who decides what capacity is needed, who is best fit to provide capacity strengthening, and when to decide that the capacity is enough? [5]

Save the Children's approach to capacity strengthening

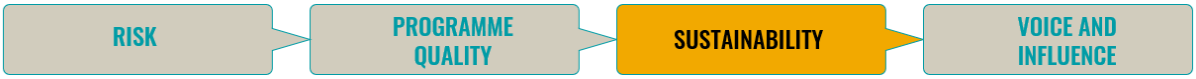
Save the Children defines capacity as "the ability of individuals, institutions, and societies to perform functions, solve problems, and set and achieve objectives in a sustainable manner that leads to improvements in the lives of children and their families".

The process of changing capacity over time is called capacity strengthening. We recognise this as an internally owned and driven process. Therefore, the appropriate role of Save the Children is capacity strengthening support. In our partnerships with CSOs, we support a range of different capacity strengthening efforts for various purposes. Save the Children's Capacity Strengthening Triangle reflects the different levels that we support:



[5] As local as possible as international as necessary, ODI/HPG (2018) and Global Perspectives on Decolonising Capacity Strengthening, INTRAC (2020)

- **Compliance focused capacity strengthening support** aims to minimise risk and support partners to comply with Save the Children's policies (such as Child Safeguarding, and procurement) and donor requirements (such as reporting, financial management, and audit).
- **Thematic/technical/programmatic focused capacity strengthening support** aims to ensure the quality of the specific project, in any thematic or cross-thematic areas, methods, principles, and standards that enhance the quality of a specific project or programme.
- **Organisational Capacity Development support** aims to support civil society organisations' mandate and sustainability, beyond the project and partnership with Save the Children.
- **Capacity strengthening support to the wider civil society** goes beyond formal partners and aims to support civil society´s influence, mobilisation, action, and civic space in promoting and defending child rights



What is OCD, and what is it not

For an organisation to be sustainable and effective, a solid organisational foundation, with functions and capacities that are fit for purpose is crucial. OCD focuses on any aspect of the organisation that may limit the organisation's ability to effectively and efficiently fulfil its mission over time - it is not a due diligence or audit process.

At Save the Children, the due diligence process called PAT (Partnership Assessment Tool) is part of the selection process before signing an agreement. Its purpose is to identify and manage risks and compliance issues. The Organisational Capacity Assessment (OCA) has a fundamentally different objective aiming to identify organisational capacity gaps to support a holistic development of the organisation beyond programmes and partnerships with Save the Children.

"If we do not overcome the gaps the organisation is facing as a whole then we cannot implement the projects properly and to their fullest potential"

– Partner in Syria

Essential principles and success factors for OCD

- OCD support is an offer to the partner as an independent actor with its own organisational identity.
- The OCD process must be owned and led by the partner and build on their organisational priorities and strategy (defined or implicit).
- An acceptance from everyone involved that OCD is most effective as a long-term commitment and dependent on a participatory approach.
- A recognition that OCD needs to be given constant and consistent attention to stay relevant, thus making it, not a linear, but a circular process.
- The partner organisation and particularly the senior leadership's commitment to engage in and allocate resources to its OCD process is key.
- The partner organisation´s ability to source support (financial and/or human) from several sources and actors for the implementation of their OCD plan is essential.

What does Save the Children expect to achieve with OCD?

How to become sustainable over time is a critical question for most organisations. Many organisations are struggling with internal challenges that cause different risks to the organisation, such as poor governance, uneven funding flows, staff retention or inadequate structures. Some organisations are also struggling with external challenges such as poor external relations or restrictive environments.

Well-functioning organisations are more resilient to withstand restrictions to their civic space and can stand stronger before state scrutiny and increased administrative demands. Organisations with a strong member base and/or diverse representation, including marginalized and discriminated groups, can show that their demands are founded on their constituency or target group/s and thereby increase their credibility.

CSOs that do not consistently and strategically address different aspects of sustainability are at risk of becoming irrelevant to both potential donors, important key actors and the chosen target group. By providing OCD support, we want to contribute to partners' organisational, financial, programmatic and environmental sustainability. These four aspects have unique characteristics and require specific actions to generate an effect, yet they are interrelated.



- **Organisational sustainability** is achieved when an organisation can sustain its operations over time and adapt to circumstances within its context. It requires a robust organisational set-up, which is fit for purpose, a strong governance system, and human and financial management. A sustainable organisation should have the support and approval of its constituency, employees, target group, stakeholders, and the community to which it relates.
- **Programmatic sustainability** is achieved when the organisation leads context relevant programming that contributes to long-term effects in society, but also when these impacts are scaled up or expanded geographically as needed and contribute to social transformations without continued dedicated project support.
- **Climate and environmental sustainability** are achieved when an organisation implements programmes without short or long-term harm to the environment, by improving waste management and resources efficiency, and by reducing greenhouse emissions.
- **Financial sustainability** refers to the organisation's ability to maintain financial capacity over time, raising its revenue, diversifying funding sources and financiers to reduce its dependence, while also being able to cover its costs and continuing programmes over time.

3. SAVE THE CHILDREN'S OCD MODEL

The organisations that Save the Children supports have their own organisational identity, which can range from being formal, loosely or informally organised and/or led by children and they operate at the national, regional and local levels. The expertise among the civil society organisations and networks varies, and the sectors they engage in are many, but collectively all of them focus on human and child rights, with a commitment and potential to contribute to sustainable societal change.

Providing OCD support is a strategic offer, closely linked to the objectives of the partnership. It is important to identify partners that are committed to developing their organisation. Integration of OCD into the partnership can be done in different ways, depending also on donor priorities and requirements:

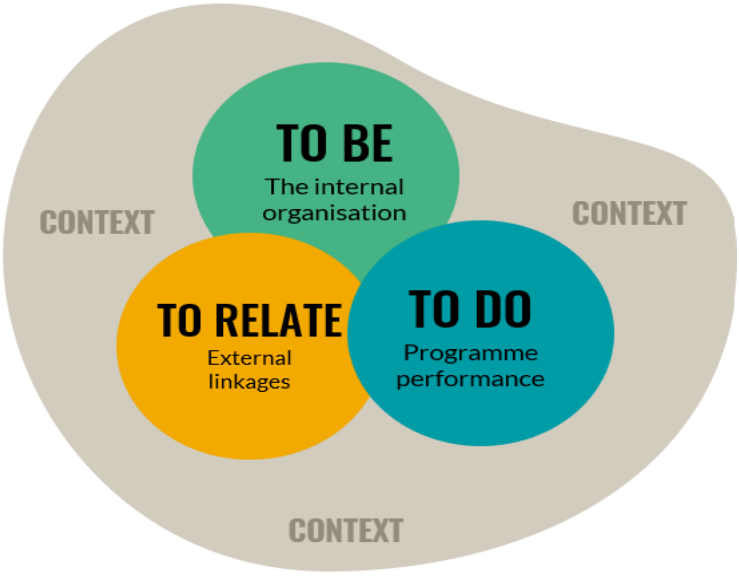
- OCD as part of administration costs (or shared ICR)
- OCD integrated into project design but without specific objectives
- OCD integrated into project design with specific objectives at the outcome level/s
- OCD and capacity strengthening of civil society is the main goal of the project/programme

TO BE – TO DO – TO RELATE

OCD are often based on versions of the three-circle model, describing dimensions of an organisation, originally developed by INTRAC[6].

- "TO BE" dimension focuses on the organisation's inner state and conditions
- "TO DO" dimension focuses on the organisation's performance or achievements
- "TO RELATE" dimension focuses on the organisation's external engagement with other actors.

The three dimensions are influenced by the context in which an organisation operates, to understand the level of capacity required or desirable, the partner must assess itself holistically within its context.



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Organisational capacity development should cover all dimensions as they are inter-related. A problem in one dimension may actually be caused by poor capacity in another.

[6] Participatory Self-Assessment of NGO Capacity, INTRAC (1995)

Functions and capacity areas

In Save the Children´s OCD model for adult-led organisations, the three dimensions have been divided into organisational functions and each function into different capacity areas:

DIMENSION	FUNCTION	CAPACITY AREA
TO BE	1. Governance	Governing body
		Governance systems and structures
	2. Human Resources	HR systems and structures
		Culture
		Leadership
		Staff and volunteers
	3. Finance	Financial systems and structures
		Cash flow
		Financial planning and reporting
		Internal control
TO DO	4. Programme	Relevance and scale
		Advocacy
		Project management
		Participation
		Monitoring and evaluation
	5. Operations	Procurement and asset management
		Safety and security
TO RELATE	6. Communication	Communication
		Media, branding and public relations
	7. External Relations	Networking and stakeholder relations
	8. Resource Mobilisation	Resource mobilisation and fundraising
		Donor relations and grant management

The partner should assess themselves against all functions and capacity areas, but within each capacity area, different levels have been developed, allowing the partner to adjust the scope of the self-assessment to fit its mission and strategic objectives.

Please note that the recommended OCD model for child-led organisations and networks has a different structure and includes 15 Quality Elements (i.e. capacity areas), which have been defined in a participatory process with children themselves. *See further under OCA Tools.*

OCD for Civil Society Networks

OCD for civil society networks focuses on the capacity of the network itself, its organisational structures, and programmatic activities, not on the capacity of each member organisation.

Civil society networks are most commonly structured around a secretariat function, whose primary functions are coordination of the network members and activities, finance and staff management (in case the network has staff of its own). In addition to the Secretariat, or within, there may be a management committee (or similar) composed of representatives of the network´s members. The management committee is responsible for strategic guidance and planning, and for making decisions on behalf of the network.

"Providing OCD support to a network is more complex than to a single CSO. A network at the regional level is even more complex and a regional child-led network takes on a whole new dimension"

– Save the Children, Latin America

If the network is not legally registered, it would need a host organisation to provide the required legality. Common practice is to rotate the host role among the network´s member organisations (every second year for instance). In this set-up, the host organisation becomes legally responsible for any agreements that the network has entered into, for any staff the network has, including for financial management. Management and coordination can however still be held by a Secretariat, management committee or similar, independent from the host organisation.

It is very important to have a clear picture of the network´s organisational structure, and the division of roles and responsibilities between different entities (network, secretariat, management committee, host organisation etc.) to ensure that the right capacity areas are assessed at the right level. In the OCA tool, there is an adjusted questionnaire specifically for networks, which needs to be adjusted to the particular features of each network. *See further under OCA Tools.*



OCD for Child-led Organisations and Networks

Children's organisations are typically made up of groups of children, joined by a common interest or cause. They are often member-based, and the children volunteer their effort and time while studying or working. Since children face many barriers to organising, such as not being able to legally register their own organisations, adults have an important role in supporting and enabling them.



Photo: Save the Children

A child-led organisation (CLO) or network may have formal structures or no structure at all, but since children are currently not allowed to register formal organisations in most parts of the world, child-led organisations and networks cannot sign donor agreements, open bank accounts, or employ staff themselves. Within these areas, a child-led organisation or network needs the support of another adult-led organisation that can provide the required legality.

CLOs and networks often have limited financial resources. This is linked to adults' lack of understanding for or recognition of children's rights to organise. If CLOs manage to attract funding at all, it is often only for specific activities or projects with limited or no cost recovery. This further limit their ability to sustain themselves and develop their course as an organisation and actor for child rights.

For all the above reasons, adjustments of the OCD tools and specific considerations, in terms of methodology and implementation, are required for OCD with child-led organisations and networks while ensuring that the process is both led and owned by the children. It is vital that adults do not impose ways of working, their views, and priorities on children, and that adults, at all times, adhere to the nine basic requirements for meaningful and ethical children's participation[7] and principles of child safeguarding, also when working online.[8]

With CLOs and networks, a more open-ended approach to OCD is recommended, facilitating the children to first picture their vision of a "good" children's group, and then comparing their organisation towards that vision, and identifying strengths and weaknesses and areas the group would like to improve. Like OCD with adult-led civil society organisations or networks, this process identifies similar capacity areas and issues of sustainability, quality, accountability and transparency in governance, implementation, and relationships. *See further under OCA Tools.*

[7] Nine Basic Requirements for Meaningful and Ethical Children's Participation, as formulated by the UNCRC, Save the Children (2021)

8 Child Participation Guidelines for Online Discussions with Children | Save the Children's Resource Centre

4. THE OCD PROCESS

OCD is a planned and conscious process that consists of holistic analysis, targeted reforms, and evaluation of changes. OCD priorities are determined by the organisation itself, irrespectively of the objectives, performance, or requirements of any specific project, programme, or donor.

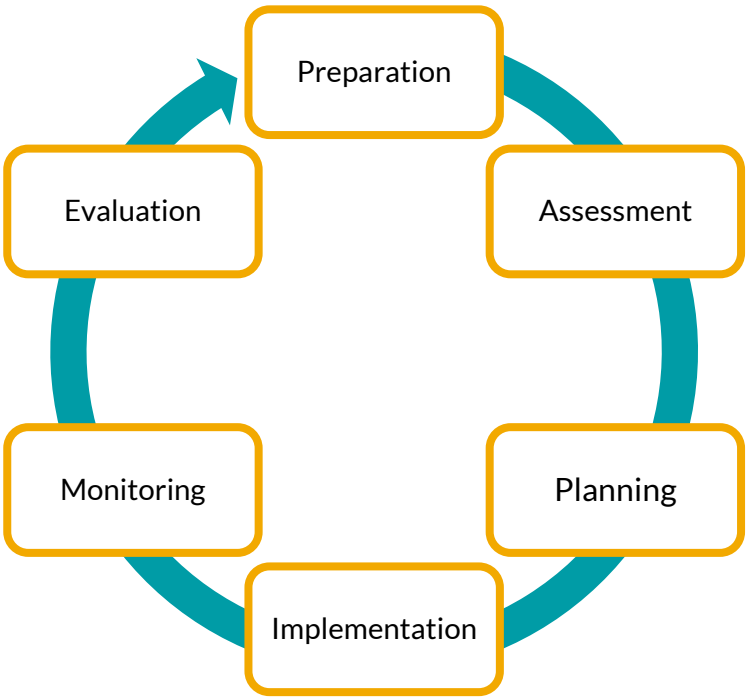
By providing OCD support, Save the Children will support the organisation establish functions and abilities that are not dependent on certain individual staff members but consistently applied over time.

To ensure local ownership and leadership, OCD must be a partner-led and partner-managed process. The OCD plan should be seen as a strategic document owned by the partner and an enabler for the fulfilment of its vision, mission, and strategy. It is not a project plan required by Save the Children, nor a way to cover ordinary administrative or operational costs.

"The sense of ownership ensures that partners do not feel that the plan is imposed on them by the project or donor and instead they are leading the process. The experience was described by partners to be unique and effective, self-driven and important"

– Save the Children, Palestine

The OCD process is similar to a project or programme cycle but differs in the overall objective and implementation methods. The steps within the OCD process are preparation, assessment, planning, implementation, monitoring and evaluation, and then the process starts again with a new assessment. The process can be repeated any number of times within defined intervals. We recommend the OCD process to follow the partner´s strategic period, with re-assessments every, or every second year.



Roles and Responsibilities

Contributing to the development of another organisation's capacity requires an equitable partnership based on mutual respect for each other's organisational identities and a shared view of the end goal of the process. Practising Save the Children's Partnership Principles—*Value-Driven & Empowering Relationships; Transparency & Accountability;* and *Mutual Benefit and Complementarity*—provides a good foundation.

The OCD process is owned and led by the partner organisation, while Save the Children takes on the role to support, encourage and facilitate, based on and in agreement with the partner's expressed needs and aspirations. OCD support takes into account the context in which the partner organisation operates, including available expertise and resources with other civil society organisations, such as a peer organisation, training institutes, or online resources. Save the Children will offer to provide technical support, however, it is the partner that decides which method they prefer to use to address a specific capacity area and with whom to work. The table below outlines the division of roles and responsibilities between Save the Children and the partner in each step of the OCD process:

PROCESS	SAVE THE CHILDREN	PARTNER ORGANISATION
Preparation	• Introduce the concept of OCD and the OCD model to the partner • Support planning	• Commitment to OCD from the senior leadership • Commit time and resources to the OCD process • Plan the OCD process, particularly the assessment exercise
Assessment	• Facilitation of the OCA exercise • Ensure that child safeguarding procedures and child participation standards are adhered to	• Ensure a diverse representation • Ensure an open and safe environment in which participants can voice their views and engage in difficult conversations • Ensure that the OCA exercise is completed with quality and according to the timeline
Planning	• Define technical and financial contributions • Facilitation, coaching and mentoring • Provide useful contact	• Analyse the results of the OCA • Establish priorities • Develop an OCD plan, incl. resource allocation (financial and human) • Formulate outcomes, outputs and, progress markers • Map and source support from different actors and opportunities
Implementation	• Provide technical and financial support • Create platforms and joint opportunities for learning and exchange between partners • Provide coaching and mentoring support	• Implement the OCD plan • Coordinate and harmonize OCD support from different actors • Engage in peer-to-peer support • Accountable for OCD outputs and outcomes

Monitoring	• Monitor technical and financial contributions and the results thereof • Capture OCD results across all partners in the programme • Lead joint outcome level analyses with all partners within the project/programme	• Monitor the implementation of the OCD plan and activities • Monitor results at output and outcome levels
Evaluation	• Commission evaluation on project or programme level, with an integrated or specific focus on OCD	• Document organisational changes generated by the OCD process • Evaluate the results of the OCD process and activities

5. PREPARATION

Introducing OCD to partners

To go through an OCD process will inevitably require commitment and resources (human and financial) from the partner to engage, and at times challenge themselves. The commitment from the senior leadership of the partner is central to ensuring accountability and strategic direction for the OCD process. It is important to communicate the process and its aim early on, to allow the partner to make an informed decision or propose an alternative to the offer of OCD support. The partner should be given sufficient time to consider and make a decision on their engagement. Expectations both ways should be clarified before the OCD process begins. It is preferable that all written information is translated into the partner's working language, if needed, for the organisation to take leadership of the process.

Pre-planning meeting for Save the Children facilitators and staff

It is essential to conduct a pre-planning meeting with all Save the Children staff who might be directly or indirectly involved in supporting partners in OCD to ensure that all share the same understanding of its purpose and methods. It may be that staff hold advanced qualifications in a technical area but has limited experience in OCD and facilitating organisational change processes. A pre-planning meeting allows for planning, going through the material, and sharing tools, resources and experiences.

"A closely accompanied OCD process and the involvement of all departments of the country office in the implementation has been of considerable value to the partners' success"

– Save the Children, Ivory Coast

Planning meeting with the partner organisation

A planning meeting with the partner aims to detail and agree on the OCD process. In this meeting, it is suitable to discuss which OCA modality to use (see below), go through available tools and resources, and agree on a date for the OCA exercise (see below). As part of organisational preparedness for the OCA and OCD implementation, the partner can be asked to invest some of its resources in the OCA and OCD process. At the meeting Save the Children can describe to the partner what documents need to be available to all participants during the OCA exercise.

Partner preparations

To get the utmost of the OCD efforts, the partner must prepare for the process with time and space to reflect, and discuss and agree on the end goal before starting to assess capacities. This is to avoid the process becoming a technical 'tick off' exercise and instead foster local ownership and leadership.

GOOD QUESTIONS TO REFLECT ON BEFORE STARTING

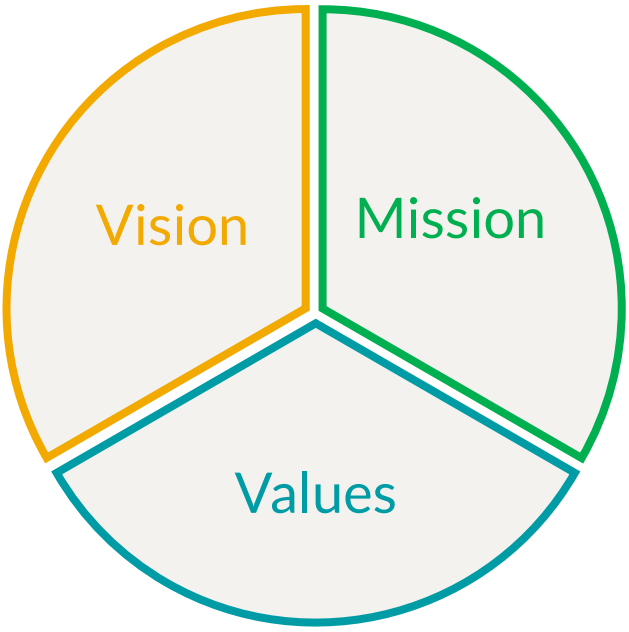
- What is our long-term vision?
- How do we develop but ensure to keep our organisational identity?
- How can we make the utmost of this OCD process?
- What are our strengths and how can we use them in this development process?
- What would success look like?
- What do we expect to change?
- Why is this change important?
- How do we ensure a participatory development process?
- What other capacity strengthening initiatives are already planned or underway?
- How do they connect?
- Are there any concerns?
- Do we have any questions to Save the Children before starting?

All organisations have their own identity built on history, values, beliefs, and purpose. It is important that any OCD efforts are respectful of that identity and that the OCD process contributes to the ambitions of the organisation. An organisational identity can be described through the answers to the questions below:



Based on the organisational identity, an organisation can develop its vision, mission and value statements. These are not only important for the organisation itself, e.g., the culture, direction of travel, sense of belonging, and commitment by staff etc., but are also essential for external communication and stakeholder engagement. Keep in mind though that there may be circumstances in which it is not suitable or secure to have such statements and other means are required to agree on the aspirations of the organisation.

- The **vision** describes what the organisation wishes to achieve, develop or contribute to in the long term.
- The **mission** defines the purpose and the mandate to which the organisation has committed.
- The **values** reflect the organisation's culture, principles and ethics.



6. ORGANISATIONAL CAPACITY ASSESSMENT (OCA)

Through the OCA, the partner will identify its strengths and weaknesses in terms of organisational policies, procedures, tools, systems, and structures. It is a holistic and systematic assessment in which staff from across functions participate to contribute with their knowledge and insights.

Scoring of the organisation´s capacity within each area of the assessment is done in relation to the organisation's vision, mission, strategy or aspirations for the future. The ideal state of an organisation is highly subjective and depends on the type of organisation it is, its operational context, and its programmatic focus. For example, two organisations with the same capacities in terms of advocacy may rate themselves differently, depending on what the respective organisations are trying to achieve or what type of actor they want to be.

The OCA is the starting point of the OCD process and provides a snapshot of the organisation at that particular point in time. If the same type of analysis is made systematically on several occasions over several years, it is also possible to follow improvements in the organisation. In this way, the OCA can be used as a baseline, for measuring changes over time and for recording the results of the OCD interventions at the end of the OCD cycle. The end line assessment will then provide the partner with a new baseline for the next OCD cycle.

"It allowed all tiers of the organization to sit in one room and voice their opinion as per their understanding and experience in the context of their respective departments. It was like a SWOT analysis but an inclusive one"

- Partner in Pakistan

Key elements of the OCA exercise

Key to a successful OCA is good preparation—the right participants, participatory methods and skilled facilitation. Save the Children´s role is to ensure that the partner captures the purpose of the OCA and makes the proper preparations ahead of the exercise. OCA must not be misunderstood, or utilised for the wrong purposes.

AN OCA IS NOT;

- A "tick off exercise"
- A way to select suitable partners
- An audit
- A way to evaluate the partner's programme performance
- A way to decide whether a partnership should continue or not
- A way to ensure the partner complies with Save the Children´s or donor's requirements

Although the partner organisation owns the process, we strongly recommend that the OCA exercise is led by skilled external (team of) facilitators who can guide the process. One of the most important aspects of conducting an OCA exercise is to create an open environment where all opinions and perspectives are equally important and relevant and participants feel safe and secure both during and after the workshop. Assessing and sharing capacity gaps with colleagues and managers can be sensitive and intimidating for many people. For all participants to express themselves freely it may be wise to divide the participants into groups (according to function or level of authority for example) and to use methods that allow for anonymous feedback. Participatory exercises during the OCA can be used to advantage with both children and adults to explore the questionnaire and agree on scoring. *See further under Resources.*

FACILITATION SKILLS

- Advanced preparation
- Clear communication
- Active listening
- Asking questions
- Timekeeping
- Establishing a psychologically safe environment for sharing
- Creating focus amongst the group
- Unbiased objectivity
- Managing the group decision process

It is the facilitator´s role to introduce the purpose and methodology, lead the group and plenary discussions, inspire reflection and enforce a culture of openness. It is also the facilitator´s responsibility to ensure that child safeguarding procedures and child participation standards are adhered to when children and young people are present.

As a facilitator, it is important to understand that it can be sensitive and seen as risky for the partner organisation to expose their capacity gaps. Building mutual trust is therefore important!

If possible, all staff, managers and Board members should be invited to participate in the OCA exercise. However, it is not critical that every individual participates; rather, it is the diverse representation that is important, as the quality of the assessment is highly dependent on different perspectives and views. An OCA exercise where all participants are in agreement or where some participants do not feel comfortable with expressing their views will struggle to produce a constructive discussion around areas of improvement.

External stakeholders, including target groups and donors, should not be invited to participate in the assessment exercise itself to respect and uphold confidentiality. The partner can choose to invite external actors to provide input in other meetings, through consultations or surveys. Internally, the Board and/or senior management team can also arrange for self-assessments of their performance in relation to governance and management issues, which can be used to develop a road map towards stronger governance practices.

We recommend all partners share a simple evaluation survey with the participants to collect their views on the OCA exercise and suggestions for improvements in any assessment reviews.

OCA Tools

Save the Children has developed three different tools for assessing an organisation's capacity depending on the type of organisation:

1. OCA tool for adult CSOs
2. OCA tool for adult CSO networks
3. OCA tool for child-led organisations and networks ("The Spider Tool")

The tools can be adapted and used independently of chosen modality, although for OCA with child-led organisations and networks we recommend conducting the exercise face-to-face.

Save the Children´s OCA tool for **adult-led** organisations and networks contains a comprehensive assessment questionnaire, covering all capacity areas per function. Within each capacity area, the questions have been grouped into three categories, where:

Green – represents basic capacities, good practices and aspects that are commonly asked for or assessed by donors. These should be assessed by all partners.

Yellow – represents more advanced capacities or more complex systems, which can be considered by the partner, depending on their ambitions or needs.

Blue – represents humanitarian essentials, in addition to the questions posed in the green and yellow categories, and should be used by those partners who are, or have the ambition to become involved in delivering humanitarian assistance.

It is important that the partner carefully considers which questions they would like to be assessed against, make changes to ensure that the questions speak to their organisational structures or concepts, and facilitate the understanding of the participants. The partners can expand the number of questions in future re-assessments and are not limited to the selection made for the first OCA. In this part of the preparation, Save the Children can play a critical role and bring advice and experience from other OCD processes and partners.

We have chosen to develop its OCA tool in Excel, however, we encourage the partner to use any other tool with which they feel comfortable recording their assessment. It can for example be done in Word or Mural, on flip charts or any other creative options that suit the dynamics of the partner organisation.



For child-led initiatives, organisations and networks, Save the Children has developed a different tool, called The Spider Tool, which helps children conduct self-assessments of their organisations or networks according to 15 key quality elements. These quality elements are different from the capacity areas defined for adult-led organisations and include additional areas such as building friendships, fostering life skills and supportive adults.

The Spider Tool is intended to promote reflection, analysis, sharing, dialogue, and action planning within child-led organisations. The assessment is based on what the child-led organisation or network are trying to achieve, what they feel they are good at, and the areas they feel should be improved. The tool, therefore, provides child-led organisations and networks with a starting point for organisational change and guides planning for changes and improvements within their groups.

GOOD, ETHICAL PRACTICE DURING THE ASSESSMENT EXERCISE:

- The exercise should be inclusive and account for diversity
- The language used should be understood and comfortably spoken by all participants
- All views and perspectives are welcome, there are no wrong opinions or viewpoints
- All views are crucial to get the full picture—listen and try to understand other perspectives
- Debates should be conducted in a respectful manner
- Concrete examples can be used, but without exposing any individual/s

OCA Modalities

What the OCA exercise will look like and how long it will take depends on the type and size of the partner organisation, what modality they chose, how well they have prepared, how many questions they have selected, and how much time they wish to spend in group and plenary discussions respectively. The modalities are:

Face-to-face OCA

It typically takes three to four days to complete the full OCA questionnaire. The advantage of a face-to-face exercise is that all participants are in the same room at the same time, which especially facilitates discussions on difficult topics, enables varied facilitation and provides opportunities for active group dynamics. This modality can easily be adapted as more child friendly with active group dynamics. A disadvantage might be that it can become costly, especially if travelling as accommodation and venues are required. It also requires facilitators to be available for several days, but it provides opportunities for deeper understanding and sharing learnings of the process, and to learn more about the partner's work, history, and social environment.

Online OCA

An online OCA preferably needs to be split into shorter sessions and spread over a longer period (typically 2 weeks). Advantages of this modality are that more people can join, and it is less costly, however, experience shows that certain group dynamics tend to get lost and, over two weeks, the participants might not follow through with the whole exercise. While it is an environment-friendly modality, it does require internet solutions for all participants and facilitation of the plenary discussions is more challenging. It also demands extensive preparation and coordination meetings to ensure an understanding of the process and tools.

"The best thing about the OCA exercise was the resolution finding. Being able as an organisation to agree on what can be done and improved on as an organisation was the best thing"

- Partner in Zambia

Hybrid OCA

The hybrid modality is used when only certain groups within the organisation can meet face-to-face, and others online, with a virtual plenary including all participants at the end. This modality is advantageous for contexts where partners have offices located in different geographical areas or networks with members in different countries. The drawback is that it might obstruct all participants to feel fully included and it is challenging for the facilitator to understand and manage group dynamics.



7. PLANNING

Following the OCA exercise, the partner will proceed to analyse the assessment results and prioritise areas they wish to include in their OCD plan. We recommend that the OCD plan follow the same period as the partner's strategic plan and that careful consideration is given to the number of capacity areas and activities that realistically can be addressed each year.

Some questions that can support the prioritisation are:

- What is most important to us in the coming period?
- Is it supporting our ambition and strategy?
- Are there capacity gaps that are linked?
- With what method do we best address the capacity gap?

In their OCD plan, the partner should include the ambition they have for each area and formulate outcomes, outputs and progress markers that are easy to measure, *see further under the Monitoring chapter*. This will help the partner track progress as well as the effect of the activities.

Budgeting should take into consideration all aspects of cost-effectiveness and cost-efficiency. Not all OCD activities come at a high cost, and some come at no cost at all. Activities that commonly require higher financial investment are for example participatory strategic planning processes, implementation of new accounting software, development of an M&E system, or upgrades to office security systems. Activities, such as policy and tools development, only require time from staff or facilitation support from a peer organisation with relevant competence. Using consultancies might be a good option at times, however, it could be costly and comes with the risk of limiting ownership and participation from the organisation´s management and staff.

If using consultants, Save the Children recommend engaging national consultants who are experienced in the context.

Once the OCD plan is developed, Save the Children and the partner should discuss which actions we can support technically and/or financially. Save the Children will offer support based on our specific technical expertise and added value, in comparison to other actors in the context in which the partner operates, and from which the partner can select.

The partner is responsible for identifying the capacity strengthening support (financial and other) it needs, and should, in addition to their own investment and the support provided by Save the Children, try to source additional support from a variety of actors (donors, peers, networks, associations, consultants) to achieve their ambitions.

For sustainability reasons, it is important to avoid that we become the sole contributor to the implementation of the OCD plan. Other organisations, including peer organisations and umbrella organisations, may have the appropriate expertise (and resources) to provide support. Save the Children can also introduce useful contacts to partners for other actors that may be better placed to provide the required support.

If the partner already has an OCD plan, based on a recent holistic self-assessment aimed to support the partner's organisational capacities, there is no need for the partner to conduct a new OCA or develop a new OCD plan. In dialogue with the partner, Save the Children will define its strategic contributions (technical and/or financial) to the already existing OCD plan.



Photo: Save the Children

Save the Children can also provide facilitation for this phase of the process if requested by the partner. This facilitation should take a coaching and mentoring approach, including providing suggestions based on lessons learnt from other partners. Keep in mind that all steps of the OCD process aim to strengthen partner capacity, so doing things for partners is to do them a disservice and counteracts ownership and leadership within the partner organisation itself.

Financial support can be provided to any activity in the partner´s OCD plan, even if Save the Children is not the provider of technical expertise for that specific activity. *See resources below.*

8. IMPLEMENTATION

The implementation of the OCD plan, quality of actions and timeliness lies with the partner, as well as the accountability for its effects. In case the partner also receives OCD support from other actors, the partner is responsible for ensuring that such support is coordinated and harmonized to be meaningful and to avoid repetition or duplication of efforts.

Save the Children, commonly through the Partnerships or Programme Management functions, is responsible to coordinate its technical and financial support internally, to ensure staff availability, timing and quality of the support. There are many different ways in which Save the Children can organise support to partners for the implementation of their OCD plans beyond financial contributions.

Pooling resources, joining trainings and exchange opportunities have proven to be very successful. Discussing OCD in a group of peer organisations does not only save costs and time but sharing successes and failures also enables peer-to-peer learning and mutual encouragement, as long as there is adequate trust and safety to be transparent or vulnerable enough to explore weaknesses with each other. Organisations can also be encouraged to provide technical expertise and general advice to each other. A more experienced organisation can support less experienced peer organisations within a specific technical area or the general OCD process.

When the partner organisations have developed their OCD plan, Save the Children can encourage and support the partner to:

- Identify and map potential support from a variety of actors for the implementation of the OCD plan.
- Present the OCD plan to relevant stakeholders and current and potential partners and ask them to contribute.
- If the organisation is partnering with several supporting organisations, coordinate OCD efforts into the same plan.
- Start an OCD cooperation with a peer organisation that also works on OCD and initiate an exchange of technical expertise.
- Build OCD into future programme design and proposal development, providing with it a justification for budget allocation in donor proposals or other resourcing mechanisms.
- Document the results of OCD implementation, for instance with case studies, and learning papers which enable institutional memory, and can be used to further showcase capacity strengthening and to source support.

TYPES OF OCD SUPPORT

- Training
- Coaching/mentoring
- Accompaniment
- Expert technical assistance
- Peer-to-peer support groups
- Facilitating access to knowledge
- Communities of Practice
- Exchange visits
- Learning circles
- Internships
- Logistical support
- Secondments
- Brokering
- On the job training
- Workshops
- Funding

9. MONITORING

Measuring the results of OCD[9]

Tracking the process, progress, and results of OCD interventions is very important for the organisation itself to justify its investments, generate evidence and demonstrate success to its donors. It is also a valuable source of information for reflection, learning and adjustment.

Organisations evolve in response to changing internal and external environments. Measuring the results of OCD as with many other capacity strengthening efforts comes with several challenges[10], for example:

- Tracking progress when the relationship between cause and effect is not fully understood
- Tracking progress when capacity strengthening interventions are spread over a long time
- Contribution[11] of activity towards the overall result
- Contribution of an external or internal resource to a specific result
- Attribution of a specific activity towards the overall result
- Attribution of an external or internal resource to a specific result
- Contextual changes having a positive/negative effect

Attribution is the accurate measurement of the extent to which a change or set of changes was caused by an agency or specific development intervention

Contribution is usually understood to mean that an intervention or agency was one amongst a number of influences that realized a change or set of changes.

OCD can be included throughout the resulting chain when developing a new project, programme, or donor proposal, where the outcome level would measure the change in organisational capacity and how it affects performance and quality implementation, while the output level would measure the direct results of the OCD activities conducted. *See concrete examples in Annex 1.*

Results at the outcome level should focus on organisational capacity change across all, or within specific, capacity areas (governance, HR, finance, programmes etc.) and the effects of policies, procedures, tools, systems and structures.

Results at the output level can cover different steps of the OCD process (assessment – plan – implementation – follow up) and how these have been implemented (quality, timeliness, participation etc.)

The most common indicator to measure holistic change at the outcome level is:

% increase (or change) in organisational capacity assessment score *(or any variety of the same)*

[9] See Annex 2 for concrete examples
[10] M&E of capacity strengthening, INTRAC (2021)
[11] Attribution & Contribution, INTRAC (2020)

Monitoring OCD

The implementation of the OCD plan, its progress, and results, should primarily be monitored by the partner organisation itself, but Save the Children will engage in joint monitoring, looking specifically at its contributions (technical and financial) and the results thereof. Monitoring outcome and output levels, and their effects, are equally important as they are complementary to each other. Therefore, we should encourage the partner to set up a monitoring and evaluation system that doesn't only look at output level but that also ensures that output results are assimilated into outcome analysis.

"At the beginning of the project we had a baseline workshop where we self-assessed our capacities, and recently we had the endline workshop in which we could see an enormous improvement in five capacity areas"

– Partner in North Macedonia

To facilitate monitoring and record a sense of achievements throughout the whole process, it is recommended to break down outcomes/outputs into progress markers. This will keep up the motivation and engagement among managers and staff within the partner organisation.

Progress markers are statements describing a gradual progression towards the desired end situation. Progress markers should describe observable changes in behaviour, relationships and actions of individuals or the organisation that are easy to measure.

In a partnership where OCD support is the main component, Save the Children should also monitor the overall implementation and changes (increase/deterioration) of organisational capacity development. When monitoring and reporting progress, it is important to keep in mind that OCD is a continuous process where one capacity area or activity may go through different stages and demonstrate significant progress even when it has not yet been completed.

The average organisational capacity assessment score provides a baseline that shows the organisational capacity at that time (commonly the first year of the project or partnership) and forms the basis for systematic monitoring. After the partner repeats the assessment exercise or updates the assessment scores in a lighter revision process, the new scoring can be compared with the baseline and progress towards an overall improvement in organisational capacity development measured.

If the difference in scoring between baseline and end line indicates a decline, it is important to analyse the underlying causes for this, as the negative scoring may just as well depend on an increase in ambition, rather than an actual decrease in capacity.

Monitoring of capacity strengthening and OCD interventions, by Save the Children should be integrated into the regular monitoring procedure and timing. Regular monitoring visits to individual partners provide a good opportunity to follow up on OCD implementation and our support, discuss progress and provide advice to the partner on any challenges they may face. At the end of the year, Save the Children and the partner should discuss progress made and agree on prioritised capacity strengthening support (technical and/or financial) from Save the Children for the following year.

Annual partner meetings are good opportunities to capture common OCD results across all partners in the programme and make joint outcome level analyses. It is also an opportune moment to provide time and a platform for sharing of experience and cross-learning, thus further contributing to the "to relate" aspect. The annual partner meeting should also provide space to address the extent, quality, and timing of Save the Children´s OCD support and any common challenges should be identified and addressed jointly during such meetings. The documentation of the annual meeting and its outcomes provides both Save the Children and the partners with a good opportunity to communicate the results internally and in dialogue with donors to encourage further investment and engagement in OCD.

10. EVALUATION

Conducting an evaluation is an encouraged practice, which allows both Save the Children and the respective partners to identify and understand the results of OCD beyond what the regular monitoring process could provide. OECD/DAC has defined six evaluation criteria, which provide a normative framework used to determine the merit or worth of an intervention (policy, strategy, programme, project or activity) 12. These criteria can be used with advantage for evaluating OCD.

When evaluating results and the effect of OCD on the organisational capacity, it is interesting to look at the interplay between OCD and other aspects of the organisation for example quality of action taken by this organisation. An evaluation could also look into deepening the understanding of one particular aspect of OCD and how it has affected the organisation/s over a period of time.

Save the Children conducts evaluations of projects, programmes, or methods (like OCD) to evaluate performance and impact, and build our evidence base and learning agenda. The partner´s reasons for conducting evaluations may be similar but focus on their organisation or programmes.

EVALUATION CRITERIA

Relevance	Is the intervention doing the right things?
Coherence	How well does the intervention fit?
Effectiveness	Is the intervention achieving its objectives?
Efficiency	How well are the resources being used?
Impact	What difference does the intervention make?
Sustainability	Will the benefits last?

[12] OECD/DAC Evaluation Criteria

11. TOWARDS THE END GOAL

An evaluation in 2021 concluded that Save the Children's capacity strengthening support *"has strengthened both individual organisations, but also civil society as a collective, which in turn has contributed to the development of new methods and collaborations that have driven the development of democracy and human rights around the world and made a big difference for vulnerable and marginalized children."*

Our civil society partners also provide evidence and testify to the importance of organisational capacity strengthening support for the development of them as strong, sustainable, and independent actors in their own right, promoting and defending human and children´s rights across the globe. In our global civil society strengthening programme, with a specific focus on OCD, 90 partners scored their capacity increase to an average of 22 % across all capacity areas, during four years of implementation.

Our years of experience in supporting OCD include several convincing and inspiring examples:

SYRIA

By investing in Syrian partners' capacity on issues like staff safety and security, HR practices, fundraising, procurement and logistics, financial management, child safeguarding, data security and programme quality, the programme has enabled partners to better manage the diverse risks that they face. It has enabled smaller CSOs, which would otherwise be considered too risky, to receive international support to address humanitarian needs in their communities.

LATIN AMERICA

Global Infancia from Paraguay has been a partner to SC Sweden since 1995 is now supporting other partners in countries where integral child protection system are in an initial phase or not yet existing. Global Infancia has contributed to both strengthening of capacities of partner staff and local state actors and also participated in high-level advocacy events where they have helped the CSO-partners to raise their profile by providing external expertise. Through this work, Global Infancia has raised their own profile, and both UNICEF and the Government of Honduras have engaged them as international experts.

BANGLADESH

While OCD support has led partners to strengthen their internal capacity to adapt to different challenges, the major change lies in their resource mobilization capacity. During the implementation of their OCD plan, Breaking the Silence (BTS) has come out from its legacy of being solely dependent on development partner Save the Children. Another partner, Social Economic Empowerment Programme (SEEP) has developed the capacity to mobilize corporate and local funds for the programme and this is more significant as they secured multi-year funding from local corporate houses. Both the OCD partners have OCD support in developing a resource mobilization strategy, which contributed to their capacity strengthening related to fund diversification. SEEP even secured funding from the Government of Bangladesh for their project and BTS also had a good track record to mobilize funds from private schools.

SENEGAL

The baseline assessment carried out in 2018 recognised OFAD as a dynamic and committed organisation with a strong community presence in one region of the country but with little experience of child protection and children's rights in general. The organisation had no strategic plan, managed its accounts using excel and had no human resources policy. They were operating out of an office with an unsteady electricity supply and no internet connection and a disorganised filing system. Their only partner was Save the Children.

Through the OCD programme, the organisation developed its first 3-year strategic plan 2018-2021 accompanied by an HR procedures manual. Comprehensive training was provided on child rights-based programming, child participation, and positive discipline and they now offer a child protection programme for their beneficiaries. Training on resource mobilisation and proposal writing techniques resulted in an increase of its donors from one to five including GIZ and EU. According to the latest report published by the regional authorities in 2021, OFAD is ranked second in the region in terms of fundraising behind the NGO PINK.

Furthermore, OFAD's staff has grown from 8 to over 45 and they have opened an additional four offices. The working environment has improved with a regular electricity and internet supply thanks to the installation of solar panels, in addition to a large meeting room with capacity for more than 100 people.

The end goal for Save the Children is to see a diversity of resourceful and unique local and national civil society actors leading programming for the realization of children's rights. It is an ambitious agenda that requires willingness, commitment and hard work from both partners and Save the Children. We believe that civil society organisations with their unique organisational identities, working close to children, with well-established systems, have a stronger likelihood of sustainably leading programmes, attracting funding and building networks that are supportive in restrictive environments. We firmly trust that when we, together with partners, strategically strengthen capacity and work in complementarity, we are better positioned to create long-lasting change for children.



Photo: Save the Children

12. RESOURCES

Save the Children OCD Resource Package

- Organisational Capacity Development Guide (2022)
- OCD Slide Deck (2022)
- Interactive and playful OCA exercises (2022)
- Organisational Capacity Assessment Tool for Civil Society Organisations (2022)
- Organisational Capacity Assessment Tool for Civil Society Networks (2022)
- Organisational Capacity Assessment Tool for Child-led Organisations and Networks, "Spider Tool" (2005)
- Organisational Capacity Development Plan Template (2022)
- Communication Brief for Partners (2022)
- Communication Brief for Donors (2022)

The Nine Basic Requirements for Meaningful and Ethical Children's Participation (2021)

The Nine Basic Requirements for Meaningful and Ethical Child Participation is a key tool for ensuring quality child participation in any initiative with children. They are built on a foundation of what children have shared with adults over many years. Presented in an easy to read colourful format, the resource includes checklists and simple tools for easy access and use.

Save the Children's Resource Centre - Localisation collection site

Save the Children's Child Rights Resource Centre is an e-library that hosts comprehensive, reliable, and up-to-date information on Save the Children's and our partners' work. The website is open to the public and provides access to thousands of quality-assured materials free-of-charge, in one convenient location. The collection sites gather material on a specific topic, thus facilitating the search for the user.

Humanitarian Leadership Academy - Kaya

HLA is a global learning initiative set up to facilitate partnerships and opportunities to enable people to prepare for and respond to crises in their own countries. Their Humanitarian online platform Kaya is free to access and offers a big variety of relevant topics for organisations.

INTRAC - Supporting civil society around the world

INTRAC is an NGO training and research centre providing training, consultancy, and research globally to help civil society organisations and networks be more effective. INTRAC's site has a wealth of useful resources open all.

Disaster Ready

Disaster Ready is an online platform offering free learning resources for humanitarian aid and development professionals.

Annex 1: Examples of result chain

This table shows results within a couple of capacity areas to provide some ideas for the partner organisation when developing and monitoring their OCD plan and results.

	CAPACITY AREA	OUTCOME	ACTIVITY	PROGRESS MARKER
TO BE	Governance	A new strategic plan was formulated and approved	• Context analysis • Stakeholder analysis • Problem analysis • SWOT analysis • Discussion of strategic options and goals • Consultations	• Strategic priorities have been identified • Wide participation and input have been secured • Board has been actively engaged
TO BE	Human Resources	Increased retention of qualified staff	• Conduct and document staff performance appraisals • Establish a constructive feedback mechanism • Develop staff development plans • Create a talent management process • Conduct training needs assessment for all staff • Establish a competitive salary and benefits package	• Staff turnover rates are reduced • Increased number of qualified staff applying for vacancies • Staff satisfaction rates increases
TO BE	Finance	Improved financial management and internal control	• Develop a financial data model • Install a computerised accounting system • Establish control functions and segregation of duties	• Reduction of non-eligible costs • Reduction of audit observations
TO DO	Programmes	Improved knowledge management	• A data management system developed • Roles and responsibilities defined	• Improved quality in reporting • Project/programme design is evidence-based • Learning is institutionalised

			• Relevant staff trained • Process for documentation of programme evidence is established	
TO DO	Operations	Improved gender awareness and practice	• Gender policy developed • Training of staff and managers on the new policy	• Recruitments are gender sensitive • Gender analysis is part of the programme design • Staff group is more gender-balanced • Increase of women in managerial positions
TO RELATE	Communications	Increased visibility	• Develop a communications strategy • Improve organisational website • Set up social media accounts • Develop material for printed media • Develop adapted material for different target groups	• Increased number of visits, likes and comments on the website and/or social media • Increased knowledge about the organisation and its work among the general public, stakeholders and target groups
TO RELATE	External Relations	Increased voice and influence through advocacy	• Advocacy strategy developed • Advocacy tools and processes developed • Dedicated budget for advocacy developed • Staff training on advocacy methods	• Increased advocacy activities • Networking/advocacy platforms established • Advocacy is an integral part of programme design • Increased recognition by duty bearers and stakeholders
TO RELATE	Resource mobilisation	Increased and diversified funding portfolio	• Donor mapping • Proposal development training for staff • Go/No go process established • Donor communication material developed	• Increased number of proposals submitted to donors • New awards and/or donors secured • Increased annual revenue

Annex 2: Checklist

ACTION	OBJECTIVE	RESPONSIBLE	TIMELINE
Introduce the OCD offer to the partner you want to support. • Arrange an introduction meeting • Share the communication brief • Introduce the OCD purpose and process	• Understanding of OCD • Informed decision by the partner (yes/no) • Confirmed senior management commitment by partner		
Introduce and engage relevant SC staff • Arrange a pre-planning meeting with colleagues from relevant functions • Get to know the OCD package • Clarify roles and responsibilities, internally and visavi the partner/s	• Understanding of OCD purpose and process • Confirmed staff commitment • Division of responsibilities		
Plan the process with the partners • Arrange a planning meeting with the partner • Discuss and select modality, tools and facilitator • Identify pre-read materials • Support the partner's preparations as required	• Confirmed participatory approach and ownership by partner • Agreed plan and timeline for the OCA exercise		
Support OCA exercise, as agreed • Provide facilitation • Provide training on Child Safeguarding procedures and child participation standards	• A participatory OCA exercise, with good ethical practice.		
Support OCD plan development, as agreed • Define SC's technical/financial contributions • Support discussion on priorities and coordination with other OCD contributors.	• A realistic, qualitative OCD plan based on the partner's ambitions and priorities.		
Support the implementation of the OCD plan as agreed • Provide technical/financial support • Provide platforms and joint opportunities for learning and exchange between partners • Provide coaching and mentoring support	• Demand-driven technical and financial support provided to the implementation of the partner's OCD plan.		
Monitoring and Evaluation • Monitor SC's technical and financial contributions and its results. • Lead joint outcome level analyses with all partners within the project/programme • Commission external evaluation	• Progress and lessons learned monitored and interventions adjusted to contextual changes as needed. • Evidence and lessons learned on OCD practice collected, documented and shared.		