THE CAPACITY CATALOGUE

Enabling Open Society grantees to achieve more

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KUMQUAT CONSULT

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Enabling Open Society grantees to achieve more

The Capacity Catalogue addresses the needs of civil society organisations operating in the European Union. It provides information which may not apply to organisations in other parts of Europe, or in other regions.

The Capacity Catalogue provides an opportunity for reflection based on the authors' professional expertise. Neither does this advice does not represent an ideal model for civil society organisations, nor constitutes absolute norms and standards to run them.

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OPEN SOCIETY FOUNDATIONS

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INTRODUCTION

This digital booklet is designed to help Open Society grantees and prospective grantees in Europe strengthen their organisations.

OPEN SOCIETY

Open Society foundations are among the world's leading philanthropic organisations. Established in 2013, the Open Society Initiative for Europe ('OSIFE') seeks to empower Europeans and their civil society organisations to reinforce, and where necessary reclaim, their central role in European democracies.

The Open Society Initiative for Europe funds projects and activities to strengthen less central voices, such as those living in Europe's geographic periphery; women; young people; proponents of non-mainstream ideologies; or the social groups that are excluded from or underrepresented in the political process, such as migrants or refugees, stateless citizens, and minorities of all kinds. Its grantees include organisations and projects in all shapes and sizes, from small or young grassroots initiatives to well-established non-governmental organisations with several decades of experience.

THE WORK OF CIVIL SOCIETY ORGANISATIONS

Regardless of their focus—human rights, building democracy or the rule of law, securing minority rights, improving access to justice—, all these organisations operate under challenging circumstances. Documenting developments or advocating for their cause with decision-makers and the public opinion is an uphill battle. Often, only limited funds are available from either public or private sources, and these organisations must generally do much with little.

Civil society organisations (CSOs) can be organised in many different ways; but like any for-profit company or public institution, they must have competencies in a number of areas in order to function well. Their capacity to do their work depends on their performance in these areas of competency—such as governance, strategy, work planning, communication, or fundraising.

This Capacity Catalogue helps civil society organisations recognise these areas of competency; assess how they currently perform; and if needed, consider devoting more resources to them or look for external support.

EXTERNAL HELP

External help comes in various forms: specialised consultants and companies are presented throughout this catalogue, but other forms of help exist. Organisations may simply need to devote more time or internal resources in order to solve a problem, or ask their own network (such as board members, peers, or more experienced organisations) for informal advice. The right expertise and competencies can often be within arm's reach, and contracting a consultant or company may not be necessary.

Importantly, Open Society often funds organisations experiencing different kinds of challenges. This means that Open Society does not require its grantees to demonstrate perfect functioning across the catalogue's competencies. Open Society positively values applicants' capacity to critically assess their strengths and weaknesses, and their willingness to address the latter to be more effective in the long run. Ultimately, the organisation's own leaders will know best whether to seek help in any form.

IN THIS PUBLICATION

Frequently Asked Questions list the questions and answers of frequent interest to grantees and prospective grantees, such as whether asking for external help will influence your grant or reputation, how to decide whether to work with a consultant or company, and who oversees consultants' work.

The Competencies section provides a detailed overview for 15 areas of competency in which CSOs can assess their performance. There is no one-size-fits-all model for a healthy organisation, and not all organisations need to cover or perform well in all these areas. This chapter provides an exhaustive list of the most common competencies covered by professional CSOs. These are governance; theories of change; strategy; management; work planning; operations; human resources; monitoring and evaluation; administrative and financial management; membership management; partnerships and alliances; fundraising; advocacy; communication; and quality systems.

Consultants features a non-exhaustive and non-prescriptive list of consultants and companies which Open Society and some of its grantees found reliable in the past. This list is for readers' information only, and does not constitute a formal list of entities approved by Open Society, or the authors.

Finally, the section Resources lists several resources—mostly books and websites—which Open Society, some grantees, and the authors found useful for CSOs.

Open Society's mission is to empower CSOs so they can contribute to more vibrant and legitimate democracies in the European Union. Helping grantees and prospective grantees strengthen their work in the longer run, building their staff's and volunteers' skills, is central to that mission. We hope this publication will be helpful to readers eager to build stronger European democracies.

Open Society grantees and prospective grantees may find these questions and answers useful. Although they are for readers' information only, the Open Society Initiative for Europe reviewed them to ensure they are as accurate and helpful as possible. In case you have any doubt, it is always best to ask your questions directly to Open Society staff.

PROFESSIONAL SUPPORT

What is professional support?
Professional support is any form of expert support to help your organisation do its work better. Various entities can provide it: individual consultants; larger consultancies providing help or advice in a specific area of competency; or experts providing specialised advice. Professional support can take the form of individual or team coaching; formal or non-formal training provided in groups; or workshops and seminars—either provided to a single organisation, or to participants from different organisations. In general, professional support is sought for specific needs and at specific times; not across several areas of competency indiscriminately, nor indefinitely.

Does my organisation need it?
This is up to your organisation's leadership to assess. Anyone formally in charge of your organisation—for example its members, its board, its directors, its staff—may identify issues that need addressing. It's usually a good idea to consider such a request seriously: What made someone ask for professional support? How serious is it? If the need is genuine, can you afford to ignore it? Otherwise, how could it be addressed internally?

Open Society generally does not impose professional support to its grantees, but may suggest critically assessing how your organisation runs part of its work.

What should I look for when getting professional support?
Above all, you should look for people or companies who will understand your needs, your issues, the context you operate in, and who can offer useful solutions. You should also consider whether they have compatible ethics and clients, have relevant experience and expertise, and how affordable and flexible they are.

Always ask for several written proposals (ideally more than one, to compare), and take the time to answer these questions: What solutions do consultants or companies offer to your issue or project? Did they understand your needs? Does their proposal look detailed, realistic, and professional? Is it cost-effective, and can its cost structure be explained? Are they happy to discuss details with you orally or by e-mail? Do you feel that you will communicate well together? Can they present similar projects they successfully completed for other clients? Ask for references, and check them: are previous clients happy they hired them? Overall, take the time to discuss your organisation's needs and the consultants' proposals carefully: this will give you a good idea of how they work.

> TIP
>
> *Ask people in similar organisations to recommend consultants or companies they've used before.*

Will this influence my reputation with Open Society?
Asking for funding to obtain professional support will never influence your reputation negatively. On the contrary, Open Society values a grantee's ability to realise what areas of their work can be improved. But your request should demonstrate a critical understanding of your work, how it can improve, and how professional support will help.

> TIP
>
> *Ask several consultants or companies for quotes, so you may compare how they approach their work, the services they would offer, and their price.*

Can I work with consultants on several issues at the same time?
You can, but will it make sense? This depends on what is at stake. Working on one area of competency at a time will enable you and your organisation to focus on improving this one competency, and adapt to change. Working on several issues at the same time could make it more difficult to integrate change, and could pressure different parts of the organisation at the same time. This would require a comprehensive approach and a clear action plan. Are the weaknesses you identified specific, or do they span several areas of work? Must you improve human resources at the same time as your strategic plan? Or advocacy at the same time as external communication? There could be valid reasons to do this, but you should be able to demonstrate them.

Can I freely choose consultants?
Yes, you can. This catalogue features a non-exhaustive list of consultants and companies which have provided good services to Open Society and its grantees. But you should be free to look for other providers, especially to work in your own city, in your own language, and/or to closely understand the issues you deal with.

MONEY MATTERS

What will it cost?
This will depend on several factors: the areas of competency you seek to improve (see Competencies); the type of help you seek (is it a standard group course? an assessment? a piece of tailored advice? how strategic or sensitive will it be?); providers' experience and seniority; the country where the organisation and/or the providers are located; their own fees and possible exchange rate charges. Don't forget that consultants may have to add value-added tax (VAT) to their fees.

Will Open Society cover these costs?
If it makes sense for a grantee to rely on professional support so they can improve their work, Open Society will consider covering these costs. This can be to improve the work to be done as part of the project(s) you're submitting to Open Society, or to improve the work your organisation does in general (e.g. if your organisation receives general support). Finally, don't forget the 'one/third' threshold: Open Society will only fund up to one third of a grantee's total annual expenditure, including all projects, general support, and professional support costs.

Is help available for free?

Some consultants or companies provide free ('pro bono') help to organisations in need—for instance if the organisation has no funding, or if it suddenly needs legal advice. Other sources of pro bono work include higher education institutions, retired professionals, or large firms interested in corporate social responsibility. Pro bono work is more likely to be offered if it involves technical expertise (e.g. legal advice, website building, or accounting) than strategic thinking (e.g. governance or managerial issues, strategy, or advocacy). Sometimes, all an organisation needs is a simple conversation to assess its problem, and this will come for free. While simple advice can often come for free, substantial work and expertise will usually be paid for.

Be aware that sometimes, pro bono work will be offered to entice organisations to buy the provider's services.

MAKING IT HAPPEN

Who needs to be consulted?

Ideally, anyone who will be affected by the professional support should be consulted, and they should be supportive. For instance, if you seek external support in the area of fundraising, various members of staff (finance, communication, management) should be consulted. In specific situations, it may be useful to involve the board. Thinking widely about who would be affected may also lead you to seek a different type of external support (for instance a workshop for several people instead of individual coaching), leading to better results.

Who oversees the work of the consultant?

The consultant or company will sign a contract with the organisation it helps, i.e. the Open Society grantee. The grantee is responsible for overseeing the work and ensuring the consultant or company delivers on their contract. This relationship should be based on trust, which is why it's important to take your time to select a consultant or company (see question 3 above).

How can I ask for professional support? Who will be accountable?

First, the organisation applying for Open Society support (potentially your organisation) requests financial support from Open Society. If Open Society agrees to support the work, it grants the funds to the applicant. The applicant then establishes the requirements for external support in the form of a call for tenders, or terms of reference. The applicant then searches for consultants and companies among its peers and network, and selects the consultant or company after comparing all the offers received. The consultant/company provides the help following the terms they agreed with the applicant, but has no formal link to Open Society.

The consultant or company will be accountable to the grantee organisation with which it established a contract, not to Open Society. However, the grantee organisation remains accountable to Open Society to ensure the funds were used properly, and led to the desired outcomes.

Do I need to publish a tender?

This isn't required, unless public authorities fund part of your work and your procurement laws require drafting terms of reference and asking a minimum number of providers for quotes.

Regardless of the above, if you foresee the contract for external support may be worth more than €5,000, publishing a tender will ensure that you have as many offers as possible, and that you will be in a position to use the funds wisely. This may also bring to your attention the existence of consultants or companies you didn't know of, and who may be competent for that piece of work, or for future work.

> ## TIP
>
> *When drafting terms of reference, establish who will assess the offers you receive, and what criteria will be used. This will help you reach a decision, and prevent confusion or volatile judgments.*

COMPETENCIES

Like any public or private organisation, healthy civil society organisations (CSOs) must perform in various areas of competency. This chapter explains what these competencies are, and why they matter. Nevertheless, readers should bear in mind that there is no one-size-fits-all model for CSOs, and that organisations may well function in different ways than portrayed here.

Self-check lists can help you assess whether your organisation performs well in a specific area of competency. If more than a third of questions in the same set receive a negative answer, you may wish to devote more attention to this area, or consider obtaining professional support.

GOVERNANCE

Governance is putting the necessary processes and procedures (statutes, bylaws, and other internal rules) in place so that an organisation can set and promote its vision, mission, strategy, values and reputation, as well as fulfil its legal duties, safeguard its assets, and oversee its work*.

Most (but not all) organisations have a legal form requiring official statutes. The statutes establish what kind of governing body the organisation has, as well as its rights and obligations. Normally, they require a separation of governance (taking strategic decisions in the organisation) and management (implementing these decisions).

Membership-based organisations normally have a general assembly composed of all members—either with or without voting rights—who determine the organisation's vision, mission, strategy, work programme, and budget, as well as their implementation, for which it is generally responsible.

Throughout the year, an organisation's strategic decision-making and oversight are taken care of by a board, composed of trustees or governors who are either nominated by the general assembly (in membership-based organisations) or co-opted (in other organisations). This generally also includes monitoring income and expenditure, managing risks, and ensuring compliance with laws and regulations. Beyond their statutory role, boards can take on advisory or managerial tasks.

SELF-CHECK

- Are there clear and practical statutes which guide your organisation, especially in times of conflict or tensions?

- Is there a clear distinction between governance and management?

- Is there regular and meaningful contact between the board and management?

- Do board members bring relevant skills and contacts?

- Is there a rotating board membership?

- Are governance meetings effective, with clear minutes and decisions?

- Are the decisions taken relevant and helpful for the organisation?

- 'Does your organisation have clear policies for its membership and volunteers?

EXAMPLE

A board of directors of over 25 members and an executive board of over ten members became unmanageable for a membership-based organisation working on climate change, and its members grew dissatisfied. The organisation hired an external adviser to help restructure these boards. The consultant concluded the two boards had too many members, and responsibilities were not clearly assigned between them. Respecting legal requirements, he proposed a new model for the board, drafted a transition plan, helped the director obtain the general assembly's consent, and implement the changes. The organisation solved its governance issue, and even started attracting new members.

It is advisable to periodically review an organisation's governance (its structure, its bylaws, the functioning of its board) every few years, to ensure it remains fit for purpose. something) about how certain changes

happen, and how organisations intend to work to influence these changes.

* See Resources for useful resources in the field of governance.

THEORIES OF CHANGE

A theory of change is a theory (a system of ideas intended to explain or predict something) about how certain changes happen, and how organisations intend to work to influence these changes*.

Organisations often—but not always—use a 'theory of change' approach to think about what change they hope to bring about in the end; what short-term or intermediate actions are required for this long-term change to happen; and what kind of evidence can show whether a theory of change works.

Contrary to a strategy, which establishes an organisation's priorities and objectives, a theory of change seeks to explain how change will happen in society at large, and why and how an organisation's work will contribute to this change.

Working on a theory of change helps clarifying how your organisation thinks it can achieve its goals: what audiences will your organisation target? What do these audiences need to have, to be, or to do? When, where, how, and for how long will your organisation work on this, and how will you measure and demonstrate success?

An effective theory of change can be used for strategic planning, work planning, and monitoring and evaluation. In practice, it means your organisation must examine its assumptions, assess how realistic its expectations are, and ensure it has enough time and resources to carry out the work you plan to do.

In the strategic phase, a theory of change is useful for all relevant stakeholders (e.g. board, staff, members, beneficiaries, allies and expert advisers) to articulate and compare their expectations, as they may have very different ideas about what they want to achieve, and how. Aligning these expectations is a vital point of departure. Theories of change also allow stakeholders to assess how they can contribute to the organisation's strategy.

SELF-CHECK

- Have you agreed on your organisation's long-term goals?

- Have you identified what intermediate results should be reached on the way to these goals?

- Have you identified which actions can demonstrably lead to these intermediate results?

- Have you identified indicators for success?

- Do you monitor progress towards these indicators?

EXAMPLE

An organisation working on a proposal for core funding had trouble expressing what it wanted to do, and why. It had made a list of proposed activities, but their coherence and logic was unclear. An external facilitator conducted a workshop with their project team to establish what the long-term goals were, what intermediate results were desirable, what methodology would most likely lead to these results, and what proof already existed to justify choosing their methodology. Many unwarranted assumptions and instances of wishful thinking were replaced by reasoned choices to support the sequential planning of resources and activities. issue, and even started attracting new members.

* Adapted from Bond: Theory of Change: the essentials (see Resources).

STRATEGY

A strategy is a coherent series of steps and initiatives to achieve your organisation's overall goal(s)*.

An organisation designs its strategy starting with a description of its vision (what an ideal world would look like), its mission (what kind of work the organisation concentrates on to make this vision a reality), and how it will achieve its objectives. This process, called strategic planning, helps organisations narrow down options: decide on issues including its geographical scope, who its beneficiaries are, the language(s) its works in, the methods it will employ, the alliances it will enter into, how it will communicate, when, and with whom.

The process of strategic planning involves different actors: usually an organisation's board, management, staff, and possibly members or expert advisers. The strategic plan spans several years (usually three to five), and informs two other vital processes: drafting more detailed yearly or multi-annual work plans or programmes, and establishing an organisation's budget. Usually, an organisation's general assembly decides on its strategy; if the organisation has no members, the board is responsible.

A theory of change is helpful to start designing a strategy. In the absence of an explicit theory of change, a strategy will implicitly point to how this organisation will achieve change.

SELF-CHECK

• Does your organisation have a clear vision, mission, and theory of change?

• Does your organisation have a strategy which includes objectives, methods, partnerships, and communication?

• Could all relevant stakeholders in your organisation contribute to its strategy?

• Are your general assembly and/or board involved in the preparation and approval of your strategy?

• Is your strategic plan concise, realistic, and affordable enough to allow you to organise your work and inform long-term decisions?

• Is your strategy assessed regularly, and revised if needed?

EXAMPLE

An organisation working on diversity wanted to revise its strategy, as it filled over 40 pages and included everything the organisation's staff had ever wished to do. They appointed an internal coordinator for the process, and recruited a facilitator for a one-day session with the directors and mid-level managers. They agreed their vision and mission were still relevant, and painfully negotiated what policy areas were most relevant, which ones had to be abandoned, agreed on the most important goals in these areas, and how to reach them. The draft strategy was presented to their board, which signed it off, making budget negotiations easier and helping the organisation focus.

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* See Resources for useful resources in the field of strategic planning.
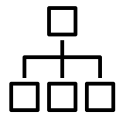
MANGEMENT

Management is heading an organisation's operations, and ensuring governance decisions (taken by the general assembly or the board), including the organisation's strategy and work programme, are implemented.

Managing an organisation well implies understanding the general assembly or the board's strategic decisions, and ensuring that the right things are done in the right way and by the right people.

In very small organisations, board members may implement their own decisions. They normally do this as unpaid volunteers, although exceptions exist.

In organisations with paid staff, the board selects and hires a director or coordinator, and possibly other individuals for managerial positions. Usually, the board explicitly delegates the organisation's management to the director(s) or coordinator(s), who in turn select and hire all other staff.

In organisations engaged with volunteers, the board usually adopts guidelines for working with them, including their profile and competencies, how and what to involve them for, and any financial implications.

SELF-CHECK

- Does your organisation implement its governance decisions effectively?

- Is the work carried out following the organisation's strategy, work programme, and budgets?

- If you have directors or coordinators, do they have the power, authority, and skills to take day-to-day managerial decisions?

- Are directors or coordinators' decisions recognised as relevant and timely throughout your organisation?

- Are decisions communicated in a clear way?

- Are tasks and responsibilities divided logically among staff or volunteers?

- Does your organisation achieve the outputs and results it committed itself to?

EXAMPLE

The new director of a development organisation had trouble managing a team which had grown used to her predecessor's laissez-faire style. A management coach helped her discuss the issue with the board, draw a new organisation chart and job descriptions, and pointed the director to potential legal advisers too. The adviser also coached her on conducting meetings, taking decisions and communicating them to the team. While some employees were unhappy with the process and left the organisation, others' morale and productivity rose, leading to a positive culture change.
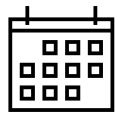
WORK PLANNING

Work planning consists in translating an organisation's strategic plan into tangible actions.

It starts from the organisation's strategic plan to design specific tasks and activities, placing them on a timeline, leading to a (usually, annual) work plan. Work planning establishes what activities will be carried out in the priority areas identified in the strategic plan; who (staff, external providers, volunteers…) will carry them out; how long they should take, and when they should be completed by; who else will be involved (trustees, colleagues, members, partner organisations and allies, external experts); and how much budget they can use.

A work plan is an important roadmap for an organisation's work, and a crucial tool to measure progress over the work plan's period.

SELF-CHECK

- Does your organisation have a yearly or multi-annual work plan, with answers to the 'what', 'who', 'when', 'how', and 'how much' questions?

- Do all actors involved understand their tasks and responsibilities in this plan?

- Are deadlines generally met, activities generally carried out, and outputs generally produced according to the plan?

- Is the budget allocated to different parts of your plan usually used well? Is it never, sometimes, or usually underused or overspent?

- Considering the resources used (staff time, funding) to implement your activities, is output satisfactory? (Is your plan cost-effective?)

EXAMPLE

A social purpose organisation had a clear idea about their mission and priorities, but lacked the capacity to synthesise them into a coherent work plan. They attracted a consultant to help them draft a three-year work programme. The consultant used a fresh approach, the documents already available, and existing decisions to prepare a draft plan with desired activities divided across work areas and priorities, adding a timeline and a budget within donors' potential grants. The consultant facilitated discussions between the board and other parts of the organisation to amend the plan, before the board shepherded the final proposal through the general assembly.

OPERATIONAL MANAGEMENT

Operational management is directing and overseeing an organisation's internal apparatus, or operations, which enables its daily work.

Operations range from material aspects, such as providing and maintaining an organisation's material infrastructure (office furniture, meeting rooms, IT systems, air conditioning, etc.), to aspects overseen by senior managers, such as establishing and updating the organisation chart (establishing how tasks and responsibilities are assigned, what staff and volunteers should do, and how they should work together).

Organisations frequently pay less attention to internal matters (such as operations) than to external matters (such as policy work, doing research, or providing services). This carries a certain risk, as it can allow for suboptimal working conditions, leading to confusion, staff dissatisfaction, or poorer output than intended.

SELF-CHECK

- Is the operational side of the organisation sufficiently staffed and funded?

- Are employees satisfied with their work environment?

- Are volunteers managed well, and valued appropriately for their contribution?

- Is there a logical division of tasks and responsibilities over specific positions?

- Are there no operational issues preventing your organisation, or individual staff members, from functioning well?

- Are all routines, procedures, and ways to work properly documented, communicated, and explained— particularly for new staff or in case of changes?

EXAMPLE

Staff grew increasingly frustrated with their work in an environmental organisation which had naturally grown in recent years. The senior management hired two consultants to find out what the problem was. Through interviews with staff, they found that work systems and routines weren't fit for purpose anymore, and that the head of the organisation remained too involved in all operations. The consultants suggested new internal procedures to the senior management, and later presented the changes to a round table discussion, where staff approved them.

HUMAN RESOURCE MANAGEMENT

Human resource management includes all the policies and decisions involved in recruiting, employing, retaining, accommodating, and dismissing employees.

An organisation's workforce is its most important asset. Human resource management includes ensuring labour laws and conditions are respected, for instance when describing and advertising jobs, conducting interviews, making financial offers, drawing up contracts, and laying off employees. Human resource management also includes policies to engage with and manage volunteers.

As an organisation grows, it will usually develop employment policies about aspects such as diversity, harassment, remuneration, promotion, appraisals, health and absenteeism, professional travel and expenses, pension contributions, and insurance and benefits. These policies ensure human resource decisions are transparent and fair.

Human resource management may also cover personal development for employees, such as training, coaching, or mentoring. Human resource managers are also often responsible for organising conflict management, mediation, away days, team building, and employee representation or work councils.

SELF-CHECK

• Does your organisation comply with all applicable labour laws?

• Does it have clear job descriptions?

• Does it have basic human resource policies, including to remunerate and promote staff, and to manage volunteers?

• Do managers monitor individual progress, and do they conduct yearly appraisals?

• Does your organisation have a balanced workforce (age, gender, origin, etc.)?

• Are there good personal development options for staff, supported by sufficient budget?

• Do managers and governing bodies take human resource management at heart?

• Is staff able to discuss human resource issues with their management, either individually or through official representation?

EXAMPLE

Employees in a humanitarian organisation were unhappy about their remuneration and prospects. The deputy director sought external help to devise a remuneration and promotion policy, but the organisation remained divided over principles such as career progression, pay rises, and the purpose of appraisals. The director disliked the consulting company's suggestion, and refused taking it to the board, maintaining that there was no money anyway. Although the staff remained discontented, they learned about the exact problems they faced.

MONITORING & EVALUATION

Monitoring is taking a step back to assess whether the organisation progresses towards its goals efficiently.

It makes sense to regularly monitor whether your organisation still does the right things in the right way, as this can change as work progresses. This is especially relevant since many organisations may commit to more work than they can deliver, and rarely reduce their amount of activities. Monitoring is also useful to avoid drifting towards activities outside the priorities agreed in a strategic plan.

Evaluation is assessing activities, projects, or programmes after they have been completed*.

As for evaluation, it can focus on processes, on results, or on both. Many organisations choose to evaluate activities, outputs, and outcomes which are easy to measure, such as the number of participants at events, the number of workshops it held, the number of publications it produced, or the number of individuals who support it. It is much more complex—but important—to focus on final impact, such as target audiences' knowledge, attitude or behaviour; or tangible changes in law and policy.

While some organisations evaluate their own activities, others believe patients cannot be their own doctors, and rely on external evaluators.

Reasons to evaluate are diverse: an organisation may wish to assess its processes and procedures; measure its impact; draw lessons from recent activities; identify best practices; justify the use of certain funds; or carrying out an evaluation as part of a grant's conditions.

No matter the reason, monitoring and evaluation help to draw lessons and avoid mistakes. An organisation can also use the

* See Resources for useful resources in the field of evaluation.

SELF-CHECK

- Does your organisation take the time to monitor and evaluate its work and activities?

- Has it established objectives and indicators for its monitoring and evaluation?

- Do you know whether you prefer internal or external evaluation, and why?

- Do you have procedures in place to guide your actions if an evaluation yields below-expectation outcomes? Will there be any consequences?

- Does your organisation capitalise on evaluation results for marketing, branding, and fundraising?

- Are positive evaluation results available to people in charge of communication and fundraising?

EXAMPLE

The conditions for a media organisation's large grant included a final evaluation of the project. They drafted terms of reference for a tender inviting external evaluators. After discussing proposals intensely, they opted for a result-oriented evaluation, to be carried out by a small consultancy rather than a large established firm. In the process, directors diverged about the evaluation's purpose, some wishing it was more about processes and learned lessons than results. After some irritation and a reassessment of the project's scope, the consultants wrote one process- and learning-oriented report for the board and management, and one results-oriented report for the organisation's donor.

results of monitoring and evaluation in its external communication by creating 'media moments' out of the positive elements identified in the evaluation. It can be helpful to highlight these achievements with current or prospective funders.

ADMINISTRATIVE & FINANCIAL MANAGEMENT

Administrative management is the way in which your organisation processes and stores the information it uses to function. A subset of administrative management, financial management covers all the financial aspects involved in running an organisation*.

Internally, good administrative management ensures that administrative items are easy to access and use. Externally, it guarantees transparency and accountability. This includes information about governance and operations, such as meetings, decisions, plans, policies, research, publications, events, activities, communication outputs, travel, and the income and expenditure related to all these.

Administrative management allows your organisation to maintain an institutional memory, i.e. documenting all contacts, contracts and assignments, important debriefings, minutes, decisions, and so on. (This is linked to knowledge management, i.e. systems to store and organise knowledge and information about an organisation's subject of expertise.)

This includes generating income, financial planning and budgeting, documenting income and expenditure, bookkeeping, preparing periodical financial reports, avoiding over- and under-spending, submitting accounts to the governing body, and often financial audits. Financial management is a field of work that requires particular training and expertise. Therefore, it is advisable to rely on experts in this area.

Importantly, administrative and financial management must comply with all the applicable laws in your organisation's jurisdiction, such as laws on accounting, taxes, employment, social security, archiving, non-profit activities, and volunteering. Often, an organisation's statutes or donors may impose additional requirements in this area.

SELF-CHECK

- Does your organisation have adequate systems and procedures to process and file administrative information?

- Are your meetings (general assembly, board meetings, staff meetings…) appropriately minuted?

- Are your organisation's operations and core activities documented in a logical and accessible way?

- Are confidential documents and data marked as such, and stored safely?

- Does your financial management allow you to monitor income and expenditure over the year, and adjust if need be?

- Are procedures in place to guarantee that only the right persons have access to the organisation's money (both in cash and on its accounts)?

- Are your organisation's work and results available, making the organisation transparent and accountable?

EXAMPLE

A small organisation carrying out public health advocacy found its administrative side underdeveloped. They identified a management consultant to do an operational assessment, and list elements to improve. Together, they concluded that the organisation needed to hire an experienced, but part-time, administration officer. They shared a job advert among their various networks and in relevant media, and the consultant helped them select the most suitable candidate.

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* See Resources for a free financial management health check.

MEMBERSHIP MANAGEMENT

Membership management is establishing and maintaining good relations with an organisation's members.

Membership-based organisations include associations, networks, platforms, fronts, action groups, or 'umbrella organisations' (whose members are other associations). Members can be individuals or other associations. As a rule, their mission is to represent their members' interests at higher policy or political levels, and with more legitimacy or power than would be feasible for individual members.

A membership-based organisation's legitimacy is a function of the number of members it has, and whether these members genuinely represent the organisation's constituency.

Membership-based organisations sometimes struggle with the fact that their members focus most on representing and safeguarding their own particular interests. This can be avoided partly by adopting good governance principles, and ensuring the general assembly adopts a clear mission, vision, strategy, and work programme—all with the support of a considerable majority of members.

In addition, the general assembly can ensure that members understand the organisation's work and its needs by asking that delegates have certain skills, and offering introductory sessions to those who wish to understand the organisation better.

Membership-based organisations often employ staff or engage with volunteers through a central secretariat. They work to meet needs that can be better met collectively, and represent the organisation's interests at higher levels. In order to do this, they explore and respond to their members' needs, seek to serve their interests, and bring together differing agendas to represent them more powerfully.

SELF-CHECK

- Do your members understand the organisation's mission, strategy, and work programme? Do they support its work?

- Is your membership balanced and representative for your constituency? Does it comprise organisations which are recognised and effective in their respective fields?

- Are all members represented fairly, taking their size, level of experience, and amount of influence into account?

- Do your members understand that they must pay membership fees, and why?

- Are staff in your organisation willing and able to actively liaise with members? Do staff understand and respond to members' needs?

- Is your organisation willing and able to consult members and mobilise them for concerted action?

EXAMPLE

Staff in the secretariat of an umbrella organisation for volunteering found the demands from their board and their members overwhelming, unbalanced, and sometimes even conflicting. They organised a joint retreat for everyone including their members' representatives, and hired an independent but knowledgeable facilitator. During the retreat, they charted the different demands, interests, resources, and available tools; assessed their relevance; clustered the most important activities together, assigning them to individual employees; and agreed to review the situation after a year.

PARTNERSHIPS & ALLIANCES

Partnerships and alliances are temporary or permanent agreements to work with other organisations in pursuit of a common goal, or to jointly implement one or several activities.

Whenever organisations share an interest—temporarily or permanently—, it may be beneficial to forge alliances or partnerships. Since civil society organisations' ultimate goals may be hard to achieve, in particular by one single actor, cooperation often makes sense. Similarly, pooling resources, sharing services, or merging organisations may be smart options to explore.

Most organisations work on topics that are of interest to other organisations too: because they are similar, connected, or face similar issues or opposition. These topics may receive the attention of smaller or larger organisations; richer or poorer ones; organisations with a narrower or wider scope than your own. These organisations may have a different geographical scope, i.e. only local, national, an entire region, or worldwide. Other differences may include levels of funding. Some organisations are more technical or professional, others may have a different focus on advocacy, communication, or litigation, and/or their ratio of staff, members, and volunteers may be different. These differences can often enrich two organisations' work.

Yet partnerships and alliances have downsides. Larger organisations can dominate smaller ones; one organisation may monopolise the success achieved through joint efforts; and objectives may diverge as a joint project is underway. It can be risky for an organisation to compromise too far on objectives, allocate too many resources to a joint venture; or associate with another organisation whose reputation is contentious.

SELF-CHECK

- Are you aware of other organisations working in the same or a connected field?

- Has your organisation assessed whether it makes sense to set up or join coalitions, alliances, platforms, or networks with others?

- Have you assessed the pros and cons to working in partnership, especially in terms of resources, efficiency, and reputation?

- Is your communication team prepared for the specific work that comes with partnerships?

- Does your organisation assess the risks involved (reputational, financial, political, and with public support) before entering partnerships?

EXAMPLE

A young membership-based organisation based in a recent EU Member State was new to the Brussels policy environment, and wanted to either form a new partnership in their field of interest, or enter existing ones. Instead of hiring a consultant, they asked similar organisations in other Member States for advice, and were pointed in the direction of a European organisation that could represent them in Brussels. They established contact, applied for membership, and benefitted from new contacts in Brussels. In the end, the help they needed came from their own network.

FUNDRAISING

Raising funds is generating income (e.g. securing grants, receiving individual donations or membership fees, selling a product or service, making investments) so your organisation is able to do the work it intends to do.

This can be a complicated affair, and several publications cover this topic extensively. Raising funds requires insight, dedication, discipline, and sufficient resources. Any serious fundraising should take place in the framework of a fundraising strategy, approved by the organisation's governing body and management.

Many organisations limit themselves to applying for grants from governments and international organisations (such as national authorities, the European Union, the Council of Europe, and the United Nations), or large donors (often foundations such as Open Society, the Barrow Cadbury Trust, the Oak Foundation, etc.). In their case, fundraising mostly means writing applications. This requires knowing the organisation's background, strategy, theory of change and work programme, and being able to construct a coherent and reasoned project: a package of activities that includes a rationale, relevant outputs, the right level of staffing, complete budget allocations, and ways to monitor progress and mitigate risks. Applications must often follow donors' strict formats and requirements. For numerous reasons, large donors tend to only fund organisations with an established legal entity.

Other sources of income include: fees for services provided; smaller donations from individuals, groups, or other organisations including for-profit businesses; selling products; or making investments. Working with these sources of income requires learning about their methods (e.g. who is likely to make individual donations; why; how much they would give; and how to best approach them), potential benefits (for instance, individual donations may allow for greater independence), and risks (for instance, harming your reputation or ethics when accepting funds from a contested for-profit entity). Managing your relationships with donors is essential to the success of your fundraising.

SELF-CHECK

- Does your organisation know how much money it needs to deliver everything in its work programme?

- Does your organisation know about its fundraising environment, i.e. who its potential donors are, what they fund, and who its competitors are?

- Does your organisation have a fundraising strategy agreed by its governance and management? Does this strategy include fundraising objectives, potential funders, how they will be approached, when, and by whom?

- Has your organisation discussed and reached a decision on the ethical and legal aspects of fundraising (i.e. which organisations' money it will and won't accept)?

- Does your organisation have enough money, staff, and time to raise funds appropriately?

- Does your organisation systematically show potential funders the outcomes and evaluations from recent activities?

EXAMPLE

A small organisation offering literacy and handicraft courses to immigrants found it could not cover costs with what little grants they got from the public authorities. They went to see a local foundation and obtained a small grant to get help from a fundraising expert. She looked at their cost structure, and suggested funding specific parts of their activity through the sale of handicrafts. The organisation held long discussions over both legal and ethical aspects, and tried the idea. They eventually decided to sell items, but only at specific fundraising events. Although this also required financial and staff resources, the new approach led to better finances for the organisation. Does your organisation systematically show potential funders the outcomes and evaluations from recent activities?

ADVOCACY

Advocacy is attempting to influence influential entities, whether public or private, such as public authorities, businesses, the media, or other civil society organisations. Advocacy seeks to place your organisation's concerns on their agendas, and influence the decisions they take so that they are in the general interest, or in the interest of your beneficiaries.

This is done through representing, mobilising, and empowering different types of stakeholders in order to change people's attitudes and beliefs, garner support for a cause, and influence policy-makers.

Through advocacy work an organisation seeks to reach its objectives. Advocacy can be organised in the framework of coherent campaigns, or as isolated actions: the publication of research, position papers, blog posts, articles, flyers, posters, or other publications; networking with relevant stakeholders; attending public or expert events and meetings; discussing and debating with allies and opponents; holding public or private conversations with decision-makers and their staff; and communicating both online and offline. Advocacy often includes 'raising awareness' with different groups, to make your cause and arguments known in order to gain sympathy and support.

In order to produce the desired outcomes, advocacy requires careful planning: mapping who holds what power; what is at stake; what processes currently exist; what opportunities present themselves; how to best approach allies, opponents, and decision-makers; what parts of the advocacy should be kept private or made public; what an organisation should request, and how strongly; what it is prepared to compromise on, and with whom, etc.

The effectiveness of advocacy work can be assessed in several ways. However in the end, the only genuine measure for advocacy is whether it had a positive influence for the interests of the people your organisation represents.

SELF-CHECK

- Does your organisation design its advocacy work in the context of its strategic plan and work programme?

- Is your organisation's advocacy organised coherently, whether as campaigns or individual actions?

- Does your advocacy planning involve mapping powers and processes at play, researching your issue, establishing objectives, defining success, crafting messages, and targeting the right audiences with the right messages?

- Does your organisation allocate appropriate money, staff, and time for advocacy?

- Has your organisation achieved tangible results through its advocacy?

- Has your organisation created or strengthened its network of supporters through its advocacy?

- Has your organisation been invited (or is it invited more often) to contribute to important debates, meetings, documents, or coalitions?

- Did your organisation's advocacy earn it more attention, capacity, stability, or a better reputation?

EXAMPLE

An organisation working for the homeless in an EU Member State wanted more influence in Brussels and Strasbourg. An organisation working on the same topic in Brussels suggested an external expert who could help them map the policy environment and the actors involved, introduce them to relevant civil servants, politicians and journalists, and advise on priorities and timing. The organisation is now a welcome partner in different alliances, a valued and accredited expert at public consultations and events, and regularly approaches politicians and civil servants directly. It also receives funding from its own government to do more international work, and often wins awards.

COMMUNICATION

Internal communication is all parts of your organisation (its staff, board, general assembly, senior management, volunteers, and members) sharing information between them to do their work.

It should be organised in such a way that everyone in your organisation knows what they need to know, at the relevant moment, while avoiding information overflow. Internal communication contributes to reaching the right decisions, making realistic plans, and carrying out the right activities.

Although internal communication can be considered an organisation's lubricating oil, it often receives less attention and resources than required. This often leads to misunderstandings, distrust, tensions, and less output and impact than desirable.

External communication is an organisation conveying information to the world (decision-makers, journalists, partner organisations, potential donors, the general public, etc.) on its work and its cause.

An organisation's external communication should build its own 'brand' (all organisations have a brand, but not all are aware of it); support and strengthen its advocacy; and ensure that the right messages reach the right target audiences. External communication is central to mobilising supporters, organising events, enabling advocacy, and publicising your research and expertise where they matter. In short, your organisation cannot do its work without good external communication.

All good communication—internal or external—requires planning. Communication plans can be drawn for specific events, advocacy campaigns, projects, or for your entire organisation's work. Such planning requires specific knowledge and competencies.

SELF-CHECK

- Does your organisation pay sufficient attention and allocate sufficient resources to both its internal and external communication?

- Does it draw up and implement communication plans for its general work, campaigns, or activities? Do these plans include objectives, messages, resources, and evaluation?

- Does internal communication allow everyone in your organisation to access all and only the information that is relevant to them at the right times?

- Does internal communication allow its different parts to work well together?

- Does external communication enable your organisation to reach its intended target audiences, shape and maintain its brand, and support its advocacy and fundraising efforts?

EXAMPLE

A large conservation society saw both its income and membership decrease. By asking around, they found out they were seen as old-fashioned and unattractive. An external communication specialist helped them segment their potential audiences, in particular younger ones, and drafted both targeted messages and a list of appropriate media to reach these audiences. The organisation was so pleased with the result that they also asked the consultant to scrutinise their internal communication, which also refreshed their own way of working.

QUALITY SYSTEMS

A quality system is a standalone set of exhaustive recommendations and criteria by which an organisation's functioning can be judged voluntarily.

Quality systems can be informal, or lead to official certification. This practice is more common in English-speaking countries than on the European continent. An advantage of quality systems is that they look at an organisation's work in its entirety, detect flaws and gaps, and suggest improvements. Another is that these labels (e.g. 'Certified ISO 9001') invite trust, and may help convince donors to fund an organisation, partner organisations to work with it, or allow an organisation to enjoy a specific tax status.

However, obtaining a certification is is time- and resource-intensive, and a lot of hard work. This work needs repeating after the certification period expires (usually several years). Applying a quality system is never cheap. Most of them, like the ISO system or Investors in People, were designed for businesses rather than non-profit organisations. A better option may be to choose a quality system designed for non-profits, such as PQASSO or Trademark for Trust.

If certification doesn't matter to your organisation, investing in management advice could be a better option.

SELF-CHECK

- Does your organisation need to be certified? Have its governance and management assessed both costs and benefits? Does your organisation have the necessary resources?

- Has your organisation established how it will react to either a positive or a negative assessment? Can you commit the resources necessary to change what the assessment will advise changing?

- If your organisation considers using a quality system, is it for proactive reasons? Or is it by reaction to something? Could other options such as targeted management advice achieve the same objectives?

- If your organisation considers using a quality system, has it explored the pros and cons, reputation, cost, and benefits of different systems?

EXAMPLE

A children's rights organisation became concerned after several child abuse scandals erupted in their country, worrying they could be associated with these scandals. They started working towards an existing quality certificate, but found the process very demanding and sometimes irrelevant to non-profits. They held a comprehensive discussion, facilitated by an external consultant, about what the organisation truly needed and which areas of their work could represent risks. As they found that their work carried little risk in reality since they did not work with children themselves, they opted to abandon the certification process. Instead, they established clear policies and procedures to protect any children they dealt with directly.

CONSULTANTS

This is a non-exhaustive list of consultants and companies which have provided good services to Open Society and its grantees in the recent past. Consultants and companies featured here provided their own descriptions. Interested readers are encouraged to visit their websites and contact these providers directly.

NAME	Chameleon
COUNTRY	Belgium
DESCRIPTION	Chameleon provides training and organisational development in project and people management, leadership and strategic planning, and a range of personal and team skills such as presentations skills, negotiation techniques, or facilitation skills.
WEBSITE	www.bright-chameleon.com
LANGUAGES	English French Portuguese
COMPETENCIES	Management Operational Management Human Resources Advocacy

NAME	CREDA Consulting
COUNTRY	Bulgaria
DESCRIPTION	CREDA Consulting assists civil society organisations and donors in Central and Eastern Europe with independent evaluation and technical assistance for organisational and strategy development, and programme design and sustainability. They specialise in the areas of democracy; good governance; social inclusion; and sustainable local development.
WEBSITE	www.credaconsulting.com
LANGUAGES	Bulgarian English
COMPETENCIES	Governance Theory of Change Strategy Monitoring & Evaluation Membership Management Advocacy

NAME	European Center for Not-for-Profit Law
COUNTRY	Hungary
DESCRIPTION	The ECNL provides comparative expertise on enabling environment for civil society in Europe and beyond. They support policy and law reform, conduct research, provide training, and contribute to global and European standard setting on freedom of association, assembly, public participation, and counter-terrorism measures affecting civil society.
WEBSITE	www.ecnl.org
LANGUAGES	Belarusian Bosnian Bulgarian Croatian English Hungarian Macedonian Montenegrin Russian Serbian
COMPETENCIES	Governance Theory of Change Advocacy

NAME	Fidèle Mutwarasibo
COUNTRY	United Kingdom/Ireland
DESCRIPTION	Fidèle provides expertise in community development, advocacy, partnership building, research, fundraising, and programme management. He has served as a director/trustee in civil society and the public sector, and specialises in the areas of equality and diversity.
WEBSITE	dileasconsulting@gmail.com
LANGUAGES	English French
COMPETENCIES	Strategy Management Monitoring & Evaluation Partnerships & Alliances Fundraising Advocacy

NAME	Frankly Speaking – Training, Research, Development
COUNTRY	Germany
DESCRIPTION	Frankly Speaking works in, for, with and about education and civil society, interculturally and internationally, providing services to organisations in the fields of youth, lifelong learning, civil society and development, including training, evaluation (strategic and educational), research, strategy development and team/group learning experiences.
WEBSITE	www.frankly-speaking.org
LANGUAGES	English French German Russian (research only) Slovak (research only)
COMPETENCIES	Strategy Management Human Resources Monitoring & Evaluation Advocacy Quality Systems

NAME	International Centre for Policy Advocacy
COUNTRY	Germany
DESCRIPTION	ICPA is dedicated to bringing more voices, expertise and evidence into policy decision-making and promoting an enabling environment where policy decisions are grounded in the public interest. They support researchers and advocates to develop evidence-informed positions, and conduct advocacy campaigns to achieve policy influence.
WEBSITE	www.icpolicyadvocacy.org
LANGUAGES	English French
COMPETENCIES	Partnerships & Alliances Advocacy Communication

NAME	Kumquat Consult
COUNTRY	Belgium
DESCRIPTION	Kumquat Consult helps progressive European organisations, foundations, and political actors with their strategy, their advocacy, and their communication. Kumquat Consult specialises in advancing progressive causes in European contexts, including in and with EU institutions and the Council of Europe.
WEBSITE	www.kumquat.eu
LANGUAGES	English French
COMPETENCIES	Theory of Change Strategy Work Planning Partnerships & Alliances Fundraising Advocacy

NAME	The Lafayette Practice
COUNTRY	France
DESCRIPTION	The Lafayette Practice, advisers in philanthropy, strategy, and management, specialises in helping its clients to strengthen their infrastructures, define or redefine operations, and develop actionable plans to make real change.
WEBSITE	www.thelafayettepractice.com
LANGUAGES	English
COMPETENCIES	Management Work Planning Operational Management Membership Management Partnerships & Alliances Fundraising

NAME	Latte Creative
COUNTRY	Italy
DESCRIPTION	Latte Creative is an agency active in the field of social innovation, culture and social business. They craft digital products designed for impact; advanced media technology to connect with the public; and advocacy strategies to make change happen by creating successful online advocacy campaigns.
WEBSITE	www.lattecreative.com
LANGUAGES	English Italian
COMPETENCIES	Advocacy Communication

NAME	Local Knowledge
COUNTRY	Belgium
DESCRIPTION	Local Knowledge is a consultancy helping non-governmental organisations, businesses and entrepreneurs set up their office and work under Belgian law. They offer a wealth of advice on legal, administrative, human resource, and financial management.
WEBSITE	www.localknowledge.be
LANGUAGES	English French
COMPETENCIES	Human Resources Administrative & Financial Management

NAME	Mango
COUNTRY	United Kingdom
DESCRIPTION	Mango focuses on strengthening the financial management and accountability of other NGOs around the world, helping them to use funds well and demonstrate this to donors and beneficiaries with clarity and confidence. They have provided financial management training, and recruitment and consultancy services since 1999.
WEBSITE	www.mango.org.uk
LANGUAGES	English French
COMPETENCIES	Financial Management

NAME	The Media Coach (Laura Shields)
COUNTRY	United Kingdom/Belgium
DESCRIPTION	The Media Coach helps its clients, including NGOs and social businesses, communicate quickly and effectively. Its team of former and current journalists provides media, social media, and presentation trainings.
WEBSITE	www.themediacoach.co.uk
LANGUAGES	English Russian Spanish
COMPETENCIES	Communication

NAME	ODS
COUNTRY	Belgium
DESCRIPTION	Organisation Development Support is a full-service consultancy offering the not-for-profit sector a wide range of integrated services that can be delivered separately or combined. They help organisations to improve their governance, management, organisational structure, strategy, work planning & implementation, communications, and recruitment.
WEBSITE	www.odsupport.eu
LANGUAGES	Dutch English French German Spanish
COMPETENCIES	Governance Strategy Operational Management Monitoring & Evaluation Membership Management Advocacy

NAME	Politics & Ideas
COUNTRY	Global
DESCRIPTION	Politics and Ideas provides online trainings, face to face workshops, as well as mentorship and technical assistance into policy- and research-based advocacy; monitoring and evaluation; fundraising; governance and management; and communicating research.
WEBSITE	www.politicsandideas.org
LANGUAGES	English Spanish
COMPETENCIES	Governance Management Monitoring & Evaluation Fundraising Advocacy Communication

NAME	Public Interest Research Centre
COUNTRY	United Kingdom
DESCRIPTION	The Public Interest Research Centre is an independent charity developing civil society strategies for more effective advocacy and communications, through research and training centred on the social psychology of values, frames, and social change.
WEBSITE	www.publicinterest.org.uk
LANGUAGES	English
COMPETENCIES	Theory of Change Advocacy Communication

NAME	Schuman Associates (Isane Aparacio)
COUNTRY	Belgium
DESCRIPTION	Schuman Associates services include understanding and obtaining funding from the EU and international donors; managing consortia with several partners from across Europe; a longstanding track record in EU trainings on all aspects of EU funds and policy; and integrated communication campaigns.
WEBSITE	www.themediacoach.co.uk
LANGUAGES	Bulgarian Dutch English French German Greek Italian Polish Romanian Spanish
COMPETENCIES	Work Planning Monitoring & Evaluation Partnerships & Alliances Fundraising Advocacy Communication

NAME	Sitepositive
COUNTRY	Germany
DESCRIPTION	Sitepositive is a group of internet professionals providing services to build or relaunch websites, ranging from communication and project management to design and implementation. Sitepositive works on a pro bono basis.
WEBSITE	www.sitepositive.org
LANGUAGES	English German
COMPETENCIES	Communication

NAME	Sonia Tomás
COUNTRY	Spain
DESCRIPTION	Sonia Tomás provides help in developing, managing, and evaluating projects for non-governmental organisations, particularly in the fields of gender, women's rights, civil society and international development. She specialises in project management, as well as monitoring and evaluation.
WEBSITE	www.leitmotivsocial.com
LANGUAGES	English French Spanish
COMPETENCIES	Theory of Change Strategy Management Work Planning Operational Management Monitoring & Evaluation

NAME	Transform
COUNTRY	United Kingdom
DESCRIPTION	Transform provides consultancy services to the leaders of organisations working towards progressive social change. They help clients improve the work of their staff and volunteers, involve their governing bodies such as boards, and rethink their organisation's purpose and performances.
WEBSITE	www.trans4mgt.com
LANGUAGES	English
COMPETENCIES	Governance Strategy Management Human Resources Monitoring & Evaluation Partnerships & Alliances

NAME	Vita Trauda
COUNTRY	Latvia
DESCRIPTION	Vita Trauda assists clients in NGOs and foundations to become effective changemakers: to improve performance, design strategic interventions, manage internal change, evaluate past successes, and define future aspirations. She brings over 20 years of experience in the government, philanthropy, NGO, and think tank sectors.
WEBSITE	vita.terauda@gmail.com
LANGUAGES	English Latvian
COMPETENCIES	Governance Theory of Change Strategy Management Monitoring & Evaluation Advocacy

This is a non-exhaustive list of resources, mostly available for free, which authors recommend to learn more about specific competencies. Where links are broken, readers are encouraged to look for the resource through a search engine.

A HANDBOOK OF NGO GOVERNANCE

This e-book by Marilyn Wyatt thoroughly presents all aspects of good governance for non-governmental organisations. Although authored under the leadership of the Central and Eastern European Working Group on Nonprofit Governance, it provides universally sound advice.

- Available from http://www.oneworldtrust.org/csoproject/images/ documents/EURO11.pdf

EFFECTIVEORGS

Two non-profit consultants based in Argentina gathered several resources on governance, strategic planning, theories of change, and self-assessment (evaluation) in both languages. Each resource ends with a useful bibliography for further reading.

- English: www.effectiveorgs.org
- Spanish: www.orgsefectivas.org

THEORY OF CHANGE: THE ESSENTIALS

The authors of this Capacity Catalogue felt this single article was worth including for its simple and effective explanation of theories of change.

- Available at www.bond.org.uk/theory-of-change-the-essentials

NATIONAL COUNCIL FOR VOLUNTARY ORGANISATIONS (NCVO)

Based in the United Kingdom, NCVO is a leading source of support and advice for non-profit organisations, serving over 11,000 member organisations. Their expertise includes an outstanding Code of Good Governance available to download for a small fee, and a quality system for non-profits (originally developed by CES).

- Code of Good Governance: http://www.ncvo.org.uk/component/ redshop/1-publications/P40-code-of-good-governance (25 pages, £5.00)
- PQASSO quality system: http://www.ncvo.org.uk/practical- support/pqasso

KNOWHOWNONPROFIT

This website is the fully-fledged resource centre on every competency covered in the Capacity Catalogue, maintained by NCVO (see above). It includes hundreds of detailed and helpful articles, as well as online courses.

- Available at www.knowhownonprofit.org

THE ORGANIZATIONAL CAPACITY ASSESSMENT TOOL (OCAT)

Consulting company McKinsey provides this free online tool to assess your organisation's operational capacity, and evaluate its own strengths and weaknesses based on a well-designed survey.

- Available at http://mckinseyonsociety.com/ocat/

TACSO MANUALS

Funded by the European Union, the Technical Assistance for Civil Society Organisations (TACSO) project authored a dozen helpful manuals and guides for trainers on management, fundraising and accessing EU funds, advocacy, and more.

- Available from www.tacso.org (menu Documents > Manuals)

MANGO'S FINANCIAL MANAGEMENT HEALTH CHECK

Financial management experts at Mango offer a free financial health check for NGOs. It is available in Arabic, Chinese, English, French, Portuguese, Russian, Spanish, and several other languages.

- Available from www.mango.org.uk/guide/healthcheck

LESSONS LEARNED

ODS has supported a number of organisations in the field of migration, refugees, anti-racism, and discrimination at the European level. Their 'Lessons Learned' guide offers an overview of common pitfalls, and a series of recommendations for organisations to improve their results.

- Available at http://www.odsupport.eu/documentsreports