



# Rosana Empowerment Foundation (REF)

*=Empowering Dreams, Transforming Lives=*

## Organizational Capacity Assessment (OCA)

An Organizational Capacity Assessment (OCA) is a valuable tool for nonprofits like Rosana Empowerment Foundation (REF) to evaluate their strengths and weaknesses in various areas of operation. This assessment helps identify areas for improvement and informs strategic planning. Below is a suggested framework for an OCA tailored to REF:

### 1. Governance and Leadership:

- Evaluate the composition and effectiveness of the board of directors.
- Assess the leadership structure and the clarity of roles and responsibilities.
- Review the organization's governance policies and procedures.

### 2. Strategic Planning:

- Analyze the clarity and relevance of REF's mission and vision statements.
- Assess the existence and implementation of a strategic plan.
- Evaluate the organization's ability to adapt to changing circumstances.

### **3. Program Management:**

- Evaluate the design and impact of REF's programs and services.
- Assess program monitoring and evaluation processes.
- Review the organization's capacity to scale its programs if needed.

### **4. Financial Management:**

- Review financial statements, budgets, and financial policies.
- Assess the organization's ability to generate revenue and diversify funding sources.
- Evaluate financial sustainability and risk management practices.

### **5. Human Resources:**

- Assess the adequacy of REF's staffing structure.
- Evaluate staff qualifications, training, and performance management.
- Review the organization's diversity, equity, and inclusion practices.

### **6. Fundraising and Resource Development:**

- Analyze fundraising strategies and donor relationships.
- Assess grant management and proposal writing capabilities.
- Evaluate the organization's use of technology for fundraising.

### **7. Partnerships and Collaborations:**

- Review existing partnerships and collaborations.
- Assess the effectiveness of REF's networking and relationship-building efforts.
- Evaluate the impact of partnerships on achieving the organization's goals.

## **8. Communications and Marketing:**

- Assess REF's branding, messaging, and public relations efforts.
- Analyze the organization's online and offline presence.
- Evaluate the effectiveness of communication strategies in reaching the target audience.

## **9. Technology and Information Management:**

- Assess the organization's use of technology for data management and reporting.
- Review the security and privacy of sensitive information.
- Evaluate the efficiency of technology in supporting operations.

## **10. Evaluation and Learning:**

- Review the organization's learning culture and capacity for adaptation.
- Assess the use of data and feedback for decision-making.
- Evaluate the organization's ability to learn from successes and failures.

## **11. Legal and Compliance:**

- Ensure compliance with all relevant laws and regulations.
- Review REF's policies on ethics, conflicts of interest, and whistleblower protection.
- Assess risk management practices.

## **12. Impact and Outcomes:**

- Evaluate the measurement of REF's social impact and outcomes.

- Assess the organization's ability to demonstrate its effectiveness to stakeholders.

### **13. Sustainability and Growth:**

- Assess REF's plans for long-term sustainability.
- Evaluate strategies for organizational growth and expansion.

### **14. Environmental and Social Responsibility:**

- Assess REF's commitment to environmental sustainability and social responsibility.

### **15. Community and Stakeholder Engagement:**

- Evaluate the organization's engagement with the communities it serves and other stakeholders.

### **16. Emergency Preparedness and Crisis Management:**

- Assess REF's preparedness for emergencies or crises that may affect its operations.

### **17. Diversity, Equity, and Inclusion (DEI):**

- Evaluate REF's commitment to DEI principles and practices.

Once you've conducted this assessment, you can create a detailed report that highlights areas of strength and areas that require improvement. This report will serve as a roadmap for REF's strategic planning and capacity-building efforts.