



Marguerite Casey Foundation Capacity Assessment Tool¹

The Marguerite Casey Foundation Organizational Capacity Assessment Tool is a self-assessment instrument that helps nonprofits identify capacity strengths and challenges and establish capacity building goals. It is primarily a diagnostic and learning tool. Results from the Assessment also can also help grantmakers deepen their understanding of the current capacity of their grantees as well as track their growth in capacity over time.

Individuals completing the assessment are asked to rate their organization on a variety of capacity elements. The capacity elements are clustered into four dimensions of nonprofit organizational capacity as delineated by The Conservation Company. Essentially, the assessment is designed to help key members of an organization:

- better understand the strengths and weaknesses of the organization's leadership (leadership capacity);
- measure the organization's ability to monitor, assess and respond to internal and external changes (adaptive capacity);
- measure the ability of the organization to utilize resources effectively (management capacity); and
- better understand how well the organization is able to implement key organizational and programmatic functions (operational capacity).

Marguerite Casey Foundation engaged in tailoring the original McKinsey Capacity Assessment Grid on which this Assessment Tool is based because we wanted to make it useful and appropriate for our grantees, who work primarily in community organizing and advocacy. This included creating new questions on community organizing and constituent involvement, as well as strengthening questions on evaluation, marketing, communication, and fundraising. We also added a more robust cultural competency component to several of the capacity elements.

Marguerite Casey Foundation has used the Tool to create baseline data to help us understand the aggregate capacity strengths and weaknesses of the organizations with which we work. We will also use the information provided by the Assessment to help us craft our collective capacity building plan, and to better understand how we can support a group of "movement building" organizations. The data provided by the Assessment allows us to better understand how our dollars might help strengthen grantee organizations as a group, and increase their collective capacity to help families create change.

We believe the Capacity Assessment Tool will be particularly useful to those grantmakers who are engaged in collective approaches to capacity building, as well as nonprofit practitioners who are interested in identifying capacity strengths and weaknesses in their organization. In our pilot of this assessment tool we found that organizations which were able to engage the Executive Director and their Board Chair or other key board members in the process found the tool and process much more useful and productive.

¹ The Marguerite Casey Foundation Organizational Capacity Assessment Tool is a derivative product of the Capacity Assessment Grid created by McKinsey and Company for Venture Philanthropy Partners (www.vppartners.org), and published in *Effective Capacity Building in Nonprofit Organizations* (2001). It was modified, reorganized, and assembled in electronic format for the Marguerite Casey Foundation (www.caseygrants.org) by Blueprint Research & Design, Inc. (www.blueprintrd.com) and is used with permission from Venture Philanthropy Partners.