

iCAT Overview for Nonprofits

Introduction: The Impact Capacity Assessment Tool (iCAT) is an assessment and planning tool that helps your nonprofit better understand its organizational capacity based on direct input from those who know you best -- your team and key stakeholders. Through an online survey, the iCAT collects anonymous input from your invited stakeholders on six, research-based organizational capacities. The iCAT automatically converts the anonymous input into an online report summarizing your organizational strengths and weaknesses and recommendations for improvement.

By participating in the iCAT and its research-based questions, you will reflect and learn how your organization can better deliver on its mission. OneOC will guide you through administering the iCAT, interpreting the results and planning for improvement.

iCAT Insights: The iCAT provides a multi-stakeholder perspective on your organization's capacity as well as research and data-driven recommendations for improvement. The iCAT assesses approximately 25 subcapacities grouped into six core capacities: Leading, Learning, Resource Generating, Planning, Managing, and Overseeing. The real-time iCAT report provides scores for each of these capacities and subcapacities and highlights top strengths and weaknesses in each of these areas. The iCAT also prioritizes a list of custom recommendations based on your organizational capacity stage and provides a capacity building plan to support your organization's ongoing improvement.



Capacity Building Recommendations

1 2 3 4 5 6 7 8 9 10

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Overseeing: Implementation Accountability

The iCAT results for BBC signal that its leaders identify some challenges with the board's capacity to oversee strategy implementation.

Most nonprofit board and staff leaders engage in some type of planning. The level and formality of these strategic plans often depends on the size and age of a nonprofit. Nevertheless, planning should be occurring regardless of how formal or sophisticated the process and product. Once a plan has been developed, the hard work truly begins -- the implementation of strategies and assessing progress against goals. Strategy implementation is one of the keys to mission progress, and leaders holding each other accountable for achieving planning milestones, objective, and measurable goals is a critical best practice. However, research has shown that most organizations rate their ability to hold everyone accountable for plan implementation as one of their weakest capacities. If this capacity is a challenge for an organization, it is likely a reflection of (1) not formalizing the organization's strategic plans, including designating staff time to specific tactics and strategies and assess progress against measurable goals and/or (2) not determining the oversight role of the board and staff leaders for holding each other accountable for progress. The key challenges and recommendations for Implementation Accountability are as follows, in order of importance:

Challenges and Recommendations for Implementation Accountability

CHALLENGE - Leaders and managers perceive that the board and executive team lack the information they need to effectively assess and address whether the organization is successfully implementing its strategic plans on time.

RECOMMENDATION - Leaders and managers need to allocate board time for pulling together and reporting on the progress of plan implementation, including the accomplishment of key objectives and goals.

OneOC will guide your organization through this self-reflective, improvement process as well as connect you with resources and actionable next steps. By facilitating either individual or group reflection on the results, OneOC will support your organization in contextualizing your results and recommendations.

Setup: The iCAT is deployed entirely online. OneOC will invite a representative of your organization to be the Account Manager. Your Account Manager will provide simple background information about your organization (the number of full-time equivalent employees and the annual operating budget). In addition, they will enter the list of at least three iCAT participants (name and email addresses), including the Organizational Administrator who is a senior leader who can provide additional details on the organization (such as mission statement, organizational/programmatic service categories, and prior/future capacity building efforts). The Account Manager can also be the Organizational Administrator and/or a regular iCAT participant. The iCAT surveys will deploy automatically to all invited participants.

Introduction

Org Info

Org Admin

Participants

Deadline

Confirm

An organization's capacities are the engine that allows it to effectively implement its programs and achieve its mission. Understanding the extent to which an organization is effectively leading, planning, managing, overseeing, learning and generating resources is the key to achieving sustainable and/or scalable positive impact. The Impact Capacity Assessment Tool (iCAT) is designed to help your organization understand these key capacity areas through its research-based questions and analytically driven reports.

You have been designated as the account manager for your organization, which means that you will be responsible for setting up the iCAT for your organization in a few steps:

1. Answer a few background questions about your organization
2. Add an organizational administrator (which may be yourself) who will answer a more detailed version of the iCAT survey
3. Provide a list of survey participants who are senior leaders and board members of your organization
4. Set a deadline for your organization to complete the iCAT

On the next few pages, you will be guided through a process for supplying the information noted above.

Begin Setup

iCAT Participants: To maximize your learning, carefully consider the various organizational perspectives to be included in the iCAT (minimum of three and maximum of 25). iCAT participants should be leaders (staff, volunteer and potentially board members) who oversee and manage organizational resources, such as the Executive Director, Program Director(s), Development Director, Board Chair, etc. Unless a nonprofit is comprised of a working board and has only a few staff, board members should not comprise more than one third of the iCAT total participants.

Survey: The iCAT deploys two types of surveys. The designated Organizational Administrator will complete the core iCAT survey plus a few additional background questions, such as the organization’s mission, who it serves, and what capacity building efforts it has completed and/or has planned. The core iCAT survey focuses on six organizational capacities, including more than 25 subcapacities. Participants rate the organization on a scale of “low, medium and high” on each capacity area, but are allowed to respond “I don’t know.” These questions come from a meta-review of existing capacity-building research, with a deep understanding and appreciation of people and their behaviors as being fundamental to organizational effectiveness. The questions are framed in a behavioral change model, so may seem repetitive in nature, but by understanding if “know-how” versus “time and resources” are “low,” the iCAT can then provide more tailored recommendations on the type of capacity building that would be most cost effective. The core iCAT takes participants approximately 30 minutes to complete.

How would you rate the Board's capacity to raise funds for the organization?

Board members...

	Low	Medium	High	I don't know
Motivate and incentivize each other to raise money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Know how to raise money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have the data and information they need to raise money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have the time and resources they need to raise money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have a lot of experience successfully raising money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>