ORGANISATIONAL STRENGTH MAP

Identify your organisation's strengths and explore areas for growth and development.

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ORGANISATIONAL STRENGTH MAP

Identify your organisation's strengths and explore areas for growth and development.

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ORGANISATIONAL STRENGTH MAP

Identify your organisation's strengths and explore areas for growth and development.

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1. The Big Picture

Where in the landscape of organisational development does your organisation sit? What is the terrain like around you? Do you have the tools you need to climb to new heights and to explore your challenges? Are you able to lead others with you on your journey to free expression? Are you confident about the resources you have and will need on that journey?

WHY USE THIS TOOL?

This **Organisational Strength Map** has been developed for IFEX members, and is designed to help you understand your organisation's strengths and opportunities in meeting the goal of fostering free expression. It will give you a snapshot of your organisation's position in the organisational development landscape, which you can use to plan the next steps in your organisation's growth. You can use it as a starting point to generate new conversations in your organisation, or contribute to ongoing discussions. The results may also help you more accurately present your organisation to the public, media and donors.

HOW TO USE THIS TOOL

Each section represents one important part of your organisation's work. Under each section are a few statements to get you thinking about how your organisation is positioned in that area. After you have read each statement, you are asked to determine if this area represents an organisational strength or challenge, from your organisation's perspective. Based on your responses, your position in the landscape will correspond to recommendations relating to your organisation's next steps on your journey.

You can use this tool section by section or all at once. One person could do the whole map for your organisation, or several individuals could do it

The Big Picture

separately and then compare recommendations. Or a group of people could do it together and through discussion come to agreement on each response.

If you encounter difficulties in using the tool, or spot things that you think should be changed, let IFEX know about them. This tool may be revised after it has been used for a while. Write to us at members@ifex.org and give us your feedback.

Start with any section you like! Each section takes only a few minutes to fill in. Nobody outside your organisation will see the results unless you choose to share them, and there are no wrong or right answers — just your best thinking at this moment on your organisation's position in its own organisational development landscape.

2. Purpose

This section will help you think about your organisation's purpose and how well it guides what you do.

DOES YOUR ORGANISATION HAVE A CLEAR PURPOSE?

An organisation needs a clear purpose: an understanding of why it exists and what it wants to achieve or change in the world. A written statement of purpose can be reviewed from time to time to ensure that it remains relevant. (Note: People often refer to an organisation's 'purpose' as its mission and/or vision.) Deliberately referring to your purpose when you plan long-term strategies and new activities, or when raising money, helps ensure that all your activities contribute to achieving what you want to achieve.

ifex ORGANISATIONAL TOOLKIT

Purpose

HOW CLEAR IS YOUR ORGANISATION'S PURPOSE?

1. The purpose of our organisation describes exactly what we are trying to achieve, and is widely understood.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

2. Our staff and Board members are committed to our organisation's purpose.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

3. When we develop a new long-term (or strategic) plan, we review our purpose to make sure it is still relevant.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

4. When we plan new activities, we refer to our organisation's purpose. We use it as a reference point to help us decide what we will do.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

5. We review our purpose to make sure it is still relevant if there have been significant changes in our working environment, e.g., political changes, what other organisations are doing, the risks we face as an organisation.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

6. Whenever we raise money, we keep our purpose at the front of our minds.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

7. When we communicate with people outside our organisation, our messages reflect our purpose.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

8. We have ways to assess whether we are achieving our purpose, and we think we are doing well.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

Purpose

STRENGTHENING YOUR PURPOSE

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. Some things you could consider include:

- Appoint someone in your organisation or create a committee to analyse your current purpose and develop a clear vision and mission statement.

- Look at your vision and mission statement to see how closely they relate to the work your organisation is currently doing.

- Find out if and how the organisation's purpose is communicated to new staff, volunteers, board members, partners, media and the communities you work with.

- Increase the visibility of your purpose by displaying your vision and mission statement on your website, email signatures and stationery.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have all of the basics covered.

Purpose

- Check the language of your vision and mission statement to see if they are still relevant or if they need updating.

- Check the organisation's outputs (for example, reports and communication products) to see that the purpose is conveyed consistently.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. We encourage you to continue developing your organisation's strength. Here are some tips to keep you on track:

- Review the tips under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Monitor and evaluate changes in your activities to ensure that your purpose remains relevant.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

We encourage sharing of best practices and lessons learned through skills exchanges between IFEX members. We would love to hear from you, please email us at members@ifex.org.
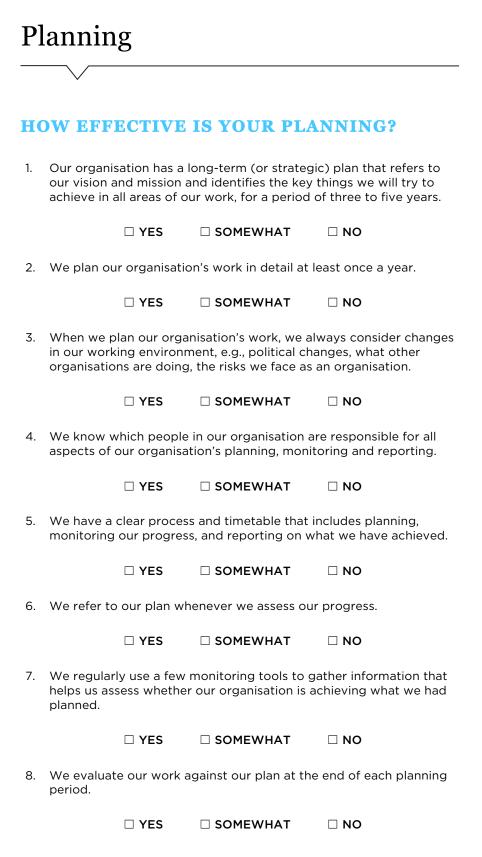
3. Planning

This section will help you think about how your organisation plans, monitors and evaluates its work.

DOES YOUR ORGANISATION PLAN AND EVALUATE EFFECTIVELY?

A good plan sets out an organisation's priorities and aligns all its activities with its vision and mission. Good planning enables individuals in every part of an organisation to understand their own role and the roles of others in achieving what the organisation as a whole wants to achieve. Long-term (or strategic) plans set out a few key things in each work area for a three- to five-year period. Shorter-term (often yearly) plans lay out in detail an organisation's priorities and task assignments for that period. Regular monitoring of your activities helps you to gauge whether or not you are achieving what you planned. Evaluation allows you to assess how well you did and analyse why you were successful, or not.

Planning

HOW EFFECTIVE IS YOUR PLANNING?

1. Our organisation has a long-term (or strategic) plan that refers to our vision and mission and identifies the key things we will try to achieve in all areas of our work, for a period of three to five years.

☐ YES   ☐ SOMEWHAT   ☐ NO

2. We plan our organisation's work in detail at least once a year.

☐ YES   ☐ SOMEWHAT   ☐ NO

3. When we plan our organisation's work, we always consider changes in our working environment, e.g., political changes, what other organisations are doing, the risks we face as an organisation.

☐ YES   ☐ SOMEWHAT   ☐ NO

4. We know which people in our organisation are responsible for all aspects of our organisation's planning, monitoring and reporting.

☐ YES   ☐ SOMEWHAT   ☐ NO

5. We have a clear process and timetable that includes planning, monitoring our progress, and reporting on what we have achieved.

☐ YES   ☐ SOMEWHAT   ☐ NO

6. We refer to our plan whenever we assess our progress.

☐ YES   ☐ SOMEWHAT   ☐ NO

7. We regularly use a few monitoring tools to gather information that helps us assess whether our organisation is achieving what we had planned.

☐ YES   ☐ SOMEWHAT   ☐ NO

8. We evaluate our work against our plan at the end of each planning period.

☐ YES   ☐ SOMEWHAT   ☐ NO

Planning

STRENGTHENING YOUR PLANNING

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

- Appoint someone in your organisation or create a committee to research and assess planning tools and methodologies that might help your organisation.

- Set programme goals for the next two years and develop an operational plan for one year.

TIP

Plans need to include SMART objectives (SMART = Specific, Measurable, Achievable, Relevant and Time-bound). There are three types of plans: strategic, operational and staff work plans.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance, you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

Planning

- Link operational plans to the objectives in your strategic plan.

- Identify tools and methods for monitoring and evaluation.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the advice under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Document your planning methodology, tools, resources and schedule (i.e., people involved, schedule for drafting a strategic or operational plan, approval process, etc.) for internal reference.

- Monitor and evaluate which areas do not go according to plan, and try to understand why.

- Plan for the unexpected: undertake risk assessment and 'worst-case' scenario planning.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

We encourage sharing of best practices and lessons learned through skills exchanges between IFEX members. We would love to hear from you, please email us at members@ifex.org.

4. Daily Operations

This section will help you think about the things that contribute to job satisfaction and the effectiveness of your day-to-day work.

ARE YOUR DAY-TO-DAY OPERATIONS RUNNING SMOOTHLY?

Organisations work best when decision-making processes are clear, roles and responsibilities are well defined, people communicate well, and everyone has easy access to the information they need to do their jobs. Communications with people outside the organisation are most effective when messages are consistent and aligned with the organisation's vision and mission. Agreed-upon operating principles (or values) can help guide the way people in an organisation work together day-to-day.

Daily operations

ARE YOUR DAY-TO-DAY OPERATIONS RUNNING SMOOTHLY?

1. Decision-making processes in our organisation are clear and work well.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

2. Management responsibilities in our organisation are clear, e.g., we know who is responsible for management of finances, human resources, planning, fundraising.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

3. We have effective ways for people in our organisation to communicate with one another, so that everybody has access to the information they need to do their work, e.g., staff or team meetings.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

4. We deal effectively with conflicts within our organisation when they arise.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

5. We have effective ways to manage the information that comes into our organisation, so people have what they need, but are not overwhelmed, e.g., shared files, databases, intranet spaces.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

6. We have considered the risks faced by people in our organisation and we have administrative policies and procedures to address them.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

7. Our organisation has stated operating principles (or values) that guide our day-to-day operations, e.g., participation, transparency, gender equality, intellectual freedom.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

Daily operations

8. We have identified public spokespeople for our organisation, and everyone understands and respects these roles.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

9. We have good working relations with the people outside our organisation that we work with most closely.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

10. Working relations between our staff and Board are positive and productive.

     ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

STRENGTHENING YOUR DAILY OPERATIONS

Use your assessment to determine your next steps. In all cases, you should:

*   Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

*   Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

*   Review or rewrite the functions and job descriptions for one part of your organization.

Daily operations

- Draw up a table of the organisation's key operational functions (e.g., fundraising, human resources, administration, communication, research, campaigning) and identify the decision-making path and decision-makers for each function. TIP: Link the operational functions to the organisation's strategic objectives.

- Identify and document ways that your organisation shares information internally (e.g., at meetings, via mailing lists, shared databases or intranets) to see if some areas need improvement. Review and update these practices periodically.

TIP

Link the operational functions to the organisation's strategic objectives.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

- List your operational policies and check how well they relate to your organisational values or principles.

- Make sure that all areas of your daily operations are treated equally (e.g., it may be clear who gives final approval for a bank transfer but not for a campaign press release).

- List the operational principles that are working well and those that are less useful, and set aside time to review these as an organisation.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

Daily operations

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the advice under "mostly no" and "mostly somewhat" to ensure there are no gaps in your planning.

- Identify operational best practices and record these as written policies. Compare past situations with the present to analyse why and how they improved.

- Set goals to improve your daily operations and prepare for the future (e.g., plan for staff hand-overs, orientation for new staff, exit interviews for staff, volunteers and board members).

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

We encourage sharing of best practices and lessons learned through skills exchanges between IFEX members. We would love to hear from you, please email us at members@ifex.org.

5. Finding Money

This section will help you think about how you get the money you need, and how you might do it more effectively.

HOW EFFECTIVE IS YOUR ORGANISATION AT FUNDING ITS ACTIVITIES?

Finding money is easier if you have a fundraising or revenue-generation strategy that spells out where you think the money will come from, who will try to get it and how. A fundraising strategy can also clarify how different parts of the organisation can contribute to raising money.

Finding Money

HOW EFFECTIVE IS YOUR ORGANISATION AT FUNDING ITS ACTIVITIES?

1. Our organisation knows where most of the money it needs for the next couple of years will come from.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

2. Most of the money we receive will be spent on activities we think are most important to fulfill our purpose.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

3. Our efforts to generate income are well integrated with our organisation's other plans and activities, e.g., strategic planning, program activities, communications.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

4. Our organisation has a fundraising or revenue-generation strategy.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

5. We receive revenue from a variety of sources, e.g., donor organisations, sale of products or services, membership fees, individuals, special events.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

6. When we develop funding proposals, we include a realistic amount for our own administrative costs, and include the value of non-cash (or "in-kind") contributions we receive, e.g., free labour, donated equipment.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

7. One person in our organisation has overall responsibility for income-generation (or fundraising) and other people know what roles they are expected to play.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

Finding Money

IMPROVING YOUR ABILITY TO FIND MONEY

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

The results show that this is an area that needs your organisation's close attention. To get started, you might:

- Prepare a chart of your donors over the last two or three years, showing the amounts, projects or themes they funded in each year. Analyse how and why their funding changed over time.

- Talk with people you know at other organisations about their fundraising experiences.

- Analyse and compare your successful and unsuccessful fundraising proposals. Why were some more successful than others?

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

- Review funders' websites and communications periodically to keep current with their priorities, even if you do not apply to them for funding. Where possible, meet in-person with funders to discuss their priorities and your work.

Finding Money

- Maintain good relationships with your current funders. Keep them informed about your work and impact, and seek their feedback. Keep abreast of any changes in their leadership, priorities, etc.

- Do research to find out which funders support other organisations that do work similar to your own.

- Stay true to your purpose when applying for funds. (Note: People often refer to an organisation's 'purpose' as its mission and/or vision.)

- Plan for different kinds and levels of funding (e.g., core funding, project funding, new initiative start-up funding). Cultivate a few funders to support your core expenditures for several years. Diversify funding for the rest of your operations.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the results under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Keep looking for new funding. Finding new donors requires time, trust and mutual understanding. It is important to build new relationships while you are financially healthy.

- Develop a financial sustainability plan to help you assess what is secure about your financial future, what you are unsure of, and what financial risks you are facing. This will help you make informed decisions about the resources you need and the strategies you choose to seek them.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

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6. People

This section will help you think about whether you are paying enough attention to the people who make your organisation work, and how well you are managing your "human resources".

HOW STRONG IS YOUR PERSONNEL MANAGEMENT?

People are the heart and soul of an organisation. The people who work there should know what is expected of them, be supported to work effectively as a team, and be committed to what you do, so they are not in conflict with one another nor burning out from overwork.

People

HOW STRONG IS YOUR PERSONNEL MANAGEMENT?

1. Our organisation has personnel policies that are written down and used, e.g., for hiring and firing, compensation, work hours, performance appraisal.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

2. One person on staff has overall responsibility for personnel management.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

3. Our organisation has strong leaders with a clear vision for the organisation, who inspire our staff and volunteers.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

4. All staff (and volunteers if we have them) have clear job descriptions and receive a thorough orientation to our organisation and their role in it.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

5. Staff set annual performance objectives for their work that align with our organisation's purpose and plans.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

6. We review the performance and workload of all staff and volunteers and provide regular feedback.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

7. Our organisation has considered how it would handle a change in leadership, and we know what we would do if our leader left the organisation.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

People

8. We encourage professional development among our staff and volunteers.

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

9. We recognize the contributions of all staff and volunteers with appropriate appreciation.

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

10. We have had no serious personnel problems in the past three years, e.g., firings, legal disputes, long-term unstaffed positions.

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

IMPROVING YOUR PERSONNEL MANAGEMENT

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

- Review and analyse staff turnover at your organisation. TIP: A high or a very low staff turnover can be a symptom of unhealthy personnel management.

- Discuss personnel policies as openly as you do other matters (e.g., in staff meetings, in formal and informal conversations) as it is a legitimate and important organisational topic.

People

- When people leave your organization, use exit interviews and confidential questionnaires to identify any major personnel issues.

TIP

Ask questions about pay and working conditions, professional motivation, leadership, clarity of purpose, planning, and any experiences of conflict.

TIP

A high or a very low staff turnover can be a symptom of unhealthy personnel management.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

- Ask all staff members to write down their current functions and compare them with their job descriptions. Adapt the job descriptions accordingly, with reference to your organisation's purpose (vision/mission) and plans.

- Develop a practice of regular (e.g., annual) performance review and consider using performance evaluation software with staff to streamline the process.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the tips under "mostly no" and "mostly somewhat" to ensure that there are not gaps in your planning.

- Identify your best personnel practices and record these as policy. Identify areas for improvement (e.g., transparency of salary scales and adjustments; work/life balance).

People

- Develop a leadership succession plan.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

We encourage sharing of best practices and lessons learned through skills exchanges between IFEX members. We would love to hear from you, please email us at members@ifex.org.

7. Managing Money

This section will help you think about how well you manage your money.

HOW EFFECTIVE IS YOUR MONEY MANAGEMENT?

Legal requirements for financial management and auditing vary from country to country, but good financial planning, budgeting, management and accounting are important everywhere. A good budget spells out where you expect to get your money, and how you expect to spend it each year. Good financial management procedures and budget monitoring tell you if you are getting the money you expected when you need it, and if it is being spent on the things it was intended for. External audits reassure yourselves, your Board, your funders and the public that your organisation can be trusted to manage money properly.

Managing Money

HOW EFFECTIVE IS YOUR MONEY MANAGEMENT?

1. Our organisation has an annual budget that we monitor regularly.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

2. We have written financial policies and procedures that are properly used, e.g., on budgeting, expense authorisation, purchasing, cheque signing.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

3. Our organisation has financial systems that are understood and used, e.g., monitoring performance against budget, planning and monitoring cash flow, allocating expenditures.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

4. Our financial management systems are overseen by a skilled financial manager.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

5. Our financial management systems include internal controls to ensure that more than one person is involved in financial oversight.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

6. Our organisation's accounts are examined annually by an accredited external accounting body.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

7. Our auditors and funders have raised no concerns about our financial management in the last three years.

    ☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

Managing Money

STRENGTHENING YOUR MONEY MANAGEMENT

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

- Make sure that your budget reflects your strategic priorities and operational planning.

- Systematically review and assess all aspects of your financial management (e.g., monitoring expenses against budget, cash flow, bank accounts) and identify weaknesses.

- Write down and adopt clear financial policies (e.g., on expenditures, reserves, banking, per diems and petty cash) and identify decision makers at all levels.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

- Identify a financial leader in the organisation (a department and/or a person).

Managing Money

- Develop clear financial policies and systems (e.g., for budget drafting and approval, per diem and petty cash guidelines). Review these policies and update them periodically.

- Develop cash flow projections annually and review them periodically.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the advice under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Identify your financial best practices and record them as policy.

- Compile an organisational manual of financial procedures, practices and policies, and update it periodically.

- Keep current with financial trends, opportunities and benefits (e.g., tax cuts, special bank accounts).

- Make sure that your financial policies reflect your organisation's values (e.g., the institution you bank with, where you invest any surplus).

- Develop a reserve fund for emergencies or other unplanned expenses, and a policy to govern its use.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

We encourage sharing of best practices and lessons learned through skills exchanges between IFEX members. We would love to hear from you, please email us at members@ifex.org.

8. Governance

This section will help you think about your legal status, your obligations, and the role of your Board of Directors.

HOW EFFECTIVE IS YOUR GOVERNANCE?

All organisations are accountable to someone, whether to the people they serve or the people who give them money. Most organisations have a Board of Directors (or Trustees) to comply with the organisation's legal requirements, ensure that it meets its obligations, and provide strategic direction to the organisation as a whole. Most organisations have legal status that comes with obligations defined by the laws of the countries where they work. If an organisation's legal status is ambiguous, it may cause difficulties that need to be addressed. Taken together, these obligations and the processes associated with them form your organisation's governance.

Governance

HOW EFFECTIVE IS YOUR GOVERNANCE?

1. Our organisation has legal status in the country (or countries) where it operates.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

2. Our organisation meets its legal obligations, e.g., to file annual reports to governments or funders, to conduct financial audits (if required), to respect relevant employment laws.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

3. Our organisation has a functioning Board of Directors that provides effective oversight to the organisation.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

4. Our organisation has a policy that governs its Board of Directors, which covers issues such as board composition, required skills, recruitment, length of tenure, diversity, etc.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

5. Our Board members receive an orientation to our organisation and their role, and they respect the distinction between staff and Board roles.

   ☐ YES   ☐ SOMEWHAT   ☐ NO

Governance

IMPROVING YOUR GOVERNANCE

Use your assessment to determine your next steps. In all cases, you should:

- Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

- Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

- Make sure you have the relevant, official documentation that proves your organisation's legal status, in original hard copy and electronic format.

- Develop a mechanism to keep track of legal obligations in your country for organisations with your status and check to see if you are in compliance.

- Make sure that each member of the Board knows and supports the purpose of your organisation, and that the board meets regularly.

- Help all Board members and the whole Board to understand their roles and make productive input into your organisation's work (e.g., suggest realistic tasks for all Board members according to their competencies, functions and available time; avoid overload, or insufficient work for Board member).

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure you have covered the basics.

Governance

- Clarify roles and responsibilities for different obligations (e.g., legal, labour, tax) and designate people and financial resources to make sure they are met.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the advice under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Identify your organisation's best practices in this area and record them as policy.

- Keep abreast of changes in employment law, tax and other government policies that might affect your organisation's obligations.

- Ensure diversity and rotation (term limits, roles) among your Board members.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

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9. Communications Planning

This section will help you think about how well your organisation supports your mission and vision with effective communications efforts.

HOW EFFECTIVE IS YOUR COMMUNICATIONS PLANNING?

Effective communication planning ensures your communication efforts are aligned with your organisation's mission and vision. A written plan assists you in assessing what time and resources you will need to carry out your proposed communication efforts. Effective communication planning enables you to articulate long-term communication efforts— activities that may take longer than a year to implement or execute—as well as shorter-term plans. Regular monitoring of your communications plan allows you to gauge whether you are reaching your goals and whether you need to adjust your activities in response to changing circumstances. Evaluation allows you to assess how well you did and to analyse why you were successful, or not.

Communications Planning

HOW EFFECTIVE IS YOUR COMMUNICATIONS PLANNING?

1. We plan our communications work in detail at least once a year, and create a written document to capture our plans.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

2. When we plan our communications work, we always refer to our strategic plan, and ensure that our communications work is aligned with our mission and vision.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

3. When we create our communications plan, we ensure that we are taking steps to support the organisation's key activities with effective communication strategies.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

4. We have staff responsible for communications who have sufficient skills in this area. We have designated staff to speak on the organisation's behalf.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

5. We have clear approval processes in place for authorizing written communications, such as website posts, press releases and public letters.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

6. We have a clear understanding of who the audiences are for our communications efforts and target our approaches and channels based on which audience(s) we want to reach.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

7. We have established goals and timetables around specific communications efforts.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

Communications Planning

8. We have identified key messages for each of our communications efforts.

☐ **YES** ☐ **SOMEWHAT** ☐ **NO**

9. We regularly use monitoring tools to gather information that helps us assess whether our communication efforts are achieving what we set out to achieve, and we evaluate our communications efforts against our plan at the end of each planning period, taking these results into account in planning for the future.

☐ **YES** ☐ **SOMEWHAT** ☐ **NO**

10. We have a crisis communications plan in place that sets out how to respond and communicate on emergency or unforeseen issues. This includes a social media crisis plan for responding to issues that arise in social media.

☐ **YES** ☐ **SOMEWHAT** ☐ **NO**

STRENGTHENING YOUR COMMUNICATIONS PLANNING

Use your assessment to determine your next steps. In all cases, you should:

• Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

• Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

Communications Planning

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

- Appoint someone in your organisation or create a committee to research and assess communication plans, tools and methodologies that might help your organisation.

- Set some basic communication objectives. They should be measurable; aligned with your organisation's mission and vision; realistic given time, budget and resources; and clear.

- Assess what communication skills you need to add to your team, and develop a plan to fill the gaps, either through training of existing staff or hiring of new staff.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have all of the basics covered.

- Conduct an analysis of who your key audiences are. Should your communications efforts be geared to reaching the general public? Legislators and influencers? Academics? Activists? You may have multiple audiences, depending on the issue. Assess who you are effectively reaching now, and who you are missing in your current communication efforts. What can you do to fill the gaps?

- Appoint someone in your organisation or create a committee to compile a year-long communications calendar for the organisation. Link your communication plans to the mission, vision and objectives in your strategic plan.

- Identify tools and methods for monitoring and evaluation.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

Communications Planning

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the tips under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Document your communications planning methodology, tools, resources and schedule (i.e., people involved, schedule for drafting a communications plan, approval process, etc.) for internal reference.

- Ensure that you have a crisis communications plan in place, and that it is up to date with current contact information for key staff.

- Assess whether there are new communications channels you should be adding to your communications mix. Is there a new social media platform you should try? A new way to package information—infographics, video, webinar, etc.— that you have not tried?

- Conduct a post mortem on your most successful and least successful communication efforts of the last year. What can you learn from your success? What can you learn from your challenges?

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

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10. Digital Security

This section will help you think about how well your organisation protects its digital information.

HOW COMPLETE IS YOUR DIGITAL SECURITY?

You rely on digital technology to achieve your outreach, data collection, communication and mobilisation objectives. However, if you are not operating in a digitally safe manner, you may be putting your organisation and those around you at risk. Adopting practices for safe communication and information integrity will help ensure the digital security of your organisation's people and information.

Digital Security

HOW COMPLETE IS YOUR DIGITAL SECURITY?

1. Our organisation has practices in place to safeguard our network and personal computers, that address physical security of the office premises as well as security of any off-site components.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

2. We protect our data with procedures for backups and recovery of information.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

3. We have introductory training or orientation information for new staff that addresses how to handle sensitive information.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

4. Our contracts with server providers guarantee the encryption and privacy of our data on their machines.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

5. We require staff to use passwords with a minimum of 8 characters, containing letters, numbers and symbols, and to change passwords frequently.

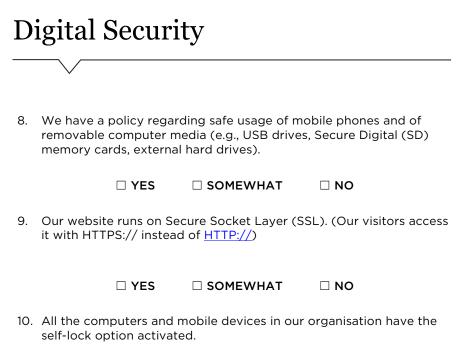   ☐ YES   ☐ SOMEWHAT   ☐ NO

6. We have a clear inventory of where our data is collected, transmitted and stored.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

7. All of our computers have anti-virus and anti-malware controls installed and regularly updated. Their operating systems are always up-to-date.

    ☐ YES   ☐ SOMEWHAT   ☐ NO

Digital Security

8. We have a policy regarding safe usage of mobile phones and of removable computer media (e.g., USB drives, Secure Digital (SD) memory cards, external hard drives).

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

9. Our website runs on Secure Socket Layer (SSL). (Our visitors access it with HTTPS:// instead of HTTP://)

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

10. All the computers and mobile devices in our organisation have the self-lock option activated.

☐ **YES**   ☐ **SOMEWHAT**   ☐ **NO**

STRENGTHENING YOUR DIGITAL SECURITY

Use your assessment to determine your next steps. In all cases, you should:

• Discuss the results of this organisational strength map with IFEX. We may be able to connect you with relevant reference materials, external consultants, training opportunities or a skills exchange with another IFEX member.

• Discuss the results with some of your most committed funders who may be able to support some areas of your organisational development.

If your assessment shows that you have answered mostly "no":

This is an area that needs your organisation's close attention. To get started, you might:

• Appoint someone in your organisation to identify where the main gaps are in the way data on your network and on your personal computers is stored and shared.

Digital Security

- Undertake a threat analysis for your organisation's work to identify key areas of vulnerability.

- Assess and categorize the sensitivity of your organisation's information and communications, e.g., "Highly Confidential", "Sensitive", "Public", etc.

- Secure your data by installing key recommended digital security tools such as those provided through the Tactical Tech "Security in a Box" website: https://securityinabox.org on staff computers and your network.

- Arrange a training/orientation for all staff to demystify digital security and engage everyone in thinking about digital security/information integrity policies for your organisation.

TIP

You may wish to bring in a consultant or security coach to help you to identify and address your organisation's digital security gaps. Contact IFEX if you need assistance identifying resource people, trainers or materials, we may be able to help.

If your assessment shows that you have answered mostly "somewhat":

You are doing well on some things in this area, and your organisation could also benefit from additional support. For instance you could:

- Review the tips under "mostly no" to ensure that you have covered the basics.

- Develop and document clear procedures and systems for your organisation's digital security (e.g., password management, anti-virus software routines, regular software updates, etc.)

- Adopt the practice of always referring to the appointed security person whenever you execute a new activity such as installation of new software, registration to websites, etc.

Digital Security

- Consider extending digital security practices to online publications such as your website (e.g., checking security practices of your server host; offering an 'https:' version of your site, etc.)

- Set goals to improve your organisation's digital security practices and an implementation plan to achieve them.

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

If your assessment shows that you have answered mostly "yes":

You are doing well in this area. Here are some tips to keep you on track:

- Review the advice under "mostly no" and "mostly somewhat" to ensure that there are no gaps in your planning.

- Make sure your digital security practices are present in your day-to-day activities by documenting your practices and developing a digital security policy for your organisation. Review and update your digital security policy annually.

- Train employees to be alert to external threats e.g., office visitors who could find sensitive information in the open, hack into the office wireless, steal backups, etc. or online personalities posing as colleagues or authorities who could gain sensitive information through deception.

- Plan for the unexpected: undertake risk assessment and 'worst-case' scenario planning for emergencies such as data loss and theft.

- Follow updated digital security advice from trusted sources such as the SANS Institute's "Critical Security Controls for Effective Cyber Defence".

- Share the results of this assessment with consultants in your community who can advise you on targeted ways forward.

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