

Users Guide



Integrated System for Transformation, Assessment & Results

**Project Concern International
Education Development Center**

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Background & Preparation

Section I



What is I-STAR?

I-STAR is a comprehensive approach to building effective and sustainable non-governmental organizations (NGOs) and networks that are able to contribute to improving the health and development of the communities they serve.

The cornerstone of I-STAR is capacity self-assessment, which serves as a springboard to change by helping an organization recognize patterns that hinder or enhance its performance. Learning gained through capacity assessment enables strategic decision-making about where to invest scarce time and resources for capacity-building initiatives.

Project Concern International (PCI) typically uses I-STAR when forming a new capacity-building relationship with a local NGO or network, and at intervals in the life of the partnership. The I-STAR process helps achieve a shared understanding of the local partner's priority needs and opportunities for change, and clarity regarding the roles of both PCI and the local partner in facilitating such change.

The I-STAR capacity assessment methods were developed by Education Development Center

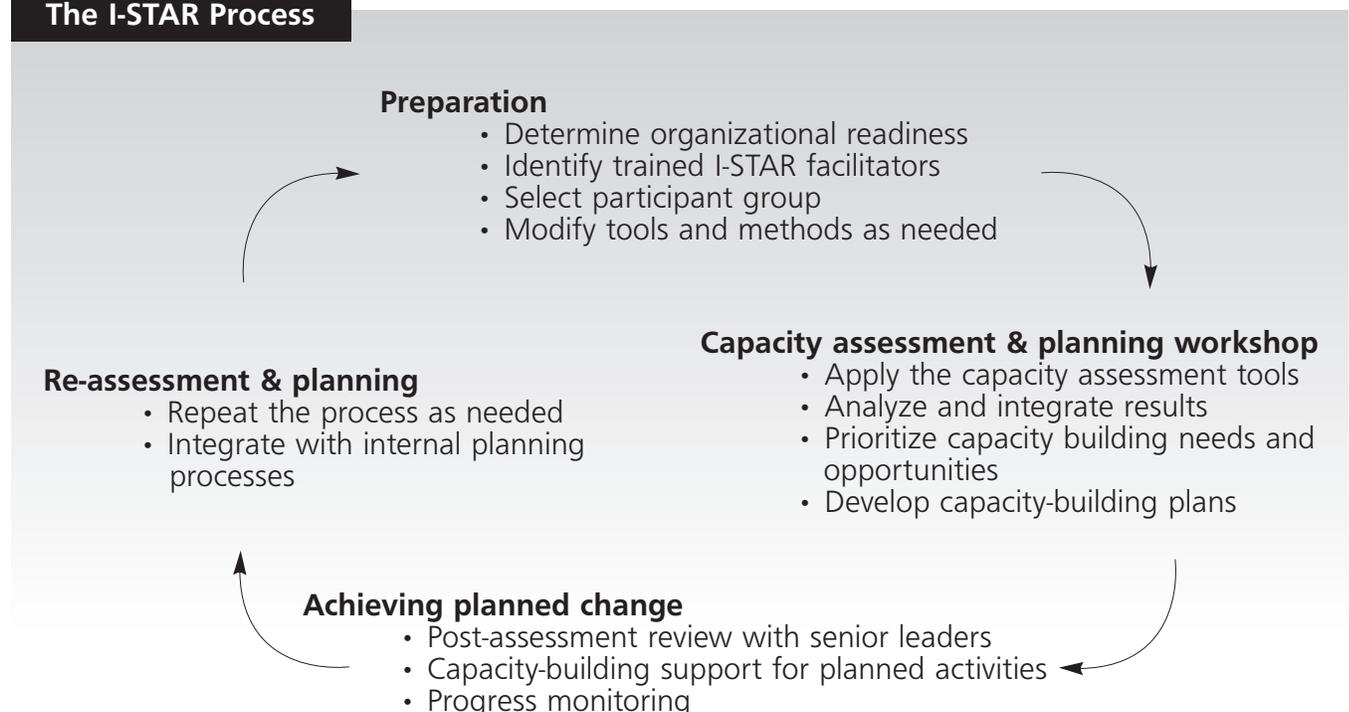
(EDC) and PCI with support from USAID's Office of Private & Voluntary Cooperation. The methods build on EDC's long history as a leader in the field of organizational development, and PCI's long history of building the capacity of local health NGOs and networks around the world. The methods were initially tested and refined over a two-year period (2001-2003) with over 15 NGOs and networks in six countries, and continue to be refined as they are used with new organizations, in new locales.

Although initially developed for use within HIV/AIDS programs, I-STAR has since evolved into two major components:

1) a core component that is appropriate for any NGO or network regardless of programmatic focus, and

2) a technical component tailored to various program areas (e.g., HIV/AIDS, reproductive health, child survival, etc). The methodologies continue to evolve based on field experience, and are adapted to meet the changing needs of partners and projects.

The I-STAR Process



Preparation

Determining organizational readiness

To determine if the NGO or network is ready to undertake a capacity assessment and planning process, the following questions should be asked of senior leaders:

- Does the organization have the leadership and commitment needed to dedicate staff time and other resources to identifying, planning, and implementing capacity change activities?
- Is the organization reasonably free from internal turmoil and crisis? (For example, not undergoing a major leadership transition, confronting a financial crisis, or engaged in significant downsizing or restructuring.)
- Does the organization have at least six staff, volunteers, or members (if a network), who are knowledgeable about the workings of the organization and are willing to participate?

If the answer to any of these questions is "No", then this is not an appropriate time for the organization to engage in a capacity assessment process.

Preliminary meetings with the partner NGO or network

- Ensure that senior management fully understands the steps involved in the process and are committed to its success.
- Identify a point-person within the organization who will champion the process, take care of scheduling and other logistical details, and select the participants.
- Review the tools and methods with the appropriate staff to determine if they are suitable for the organization. (Note that the current version of the tools have not been as successful with smaller community based organizations.)
- At present, the complete materials are available in English and Spanish, and some of the tools have been translated into the Indian

languages Bengali and Telegu. For any other languages, translation time needs to be factored into the preparation stage.

- Discuss ways in which the organization can create a "safe environment" for participants to speak openly. This could include: off-site assessment, discussion of ground rules that emphasize mutual respect, a commitment to confidentiality, and the use of an external facilitation team.

Composition of the participant group

Facilitators should work with the organization's point-person to establish the participant group. The group should have no less than six and no more than 20 participants.

FOR AN **NGO**, THE PARTICIPANTS SHOULD REPRESENT:

- Different departments and organizational functions
- Different levels of authority
- Different periods of time working with the organization (= or > 1 year)

FOR A **NETWORK**, THE PARTICIPANTS SHOULD REPRESENT:

- Different types of member organizations
- Different roles and responsibilities within the network, including levels of authority
- Different periods of time being members of the network (= or > 1 year)

Participants should have sufficient literacy skills to be able to complete the written forms on their own without assistance, and to participate in data analysis which relies on the use of written reports. Although the participant group is intended to be a 'sample' of the organization's staff, and not just management level, it is important to select participants who have enough exposure to the various functions of the organization so that they can participate fully.

It is generally discouraged to have the Executive Director (ED) of the NGO or the most senior leader of the network participate in the assessment phase. However, there are

advantages and disadvantages to consider:

- An advantage is that if the senior leader participates, this person will be more committed to the outcomes and will have a keener understanding of staff or members' perspectives.
- A disadvantage is that in some cases, participants may not be comfortable speaking freely with the senior leader present, and the leader may dominate the dialogue or have too strong an influence on participants' contributions.
- If there are any concerns about the senior leader participating, a compromise can be to have this person join the second half of the process, the analysis and planning phases only. For this to succeed, a facilitator would need to orient the senior leader to the tools and process prior to having that person join the group on the 2nd day, including making sure that key terms are understood.
- Please see Attachment C for more thoughts regarding ED participation.

Facilitation team

Facilitating the I-STAR capacity assessment and planning process takes skill and preparation. Facilitators should be properly trained in use of the methods by an experienced user. This User's Guide is not a substitute for training.

THE MOST SUCCESSFUL I-STAR FACILITATORS CAN:

- manage group dynamics
- balance participation with moving the process along
- apply basic adult learning principles
- organize and synthesize complex ideas into simple, concrete language
- draw on experience with NGO or network capacity-building

Two facilitators are needed. A "lead facilitator" who is more experienced can be paired with someone less experienced, as a way to build a larger cadre of I-STAR facilitators. If available, a

third person experienced with focus group discussions and Excel can be a useful addition to assist with preparing data outputs during the meeting.

Adapting the tools

The performance standards for both the NGO version and the network version of the I-STAR tools were developed based on research and experience regarding the types of practices high-performing organizations and networks engage in. However, no one tool can fit all circumstances.

Facilitators should review the performance standards and the language of the tools with the NGO or network representative prior to conducting the assessment, to ensure that they are appropriate. The standards can be adapted as needed, keeping in mind that all standards should be:

- written as *behaviors* an organization engages in, not *characteristics* an organization possesses (e.g., systems, resources, procedures, etc)
- as single-dimensional as possible
- not so simple as to score an easy "10"
- set a little higher than the organization's current practice, to spark new ideas about excellence

Changes in the standards must be made on both the tools that are distributed to participants during the workshop, as well as to the Excel data processing templates used to tabulate the data. Assistance with revising standards, and instructions on how to revise the data processing templates to reflect changes in the standards, can be provided by the PCI International Office (IO).

The roundtable discussion questions should be adapted by the facilitators, prior to the workshop, to reflect the themes that are most relevant for the NGO or network. Facilitators should work with key partner staff to determine the most appropriate themes, using the question guide provided in Section III below as a starting point.

What elements of the process cannot be changed?

Although many elements of the capacity assessment and planning process can be adjusted, a few things should not be changed:

- Scoring should always be confidential and anonymous in order to ensure an honest and accurate assessment of the partner's capacity situation.
- The tools were not designed to be administered as an individual survey and should not be used this way. They are designed to be used in group process.
- Participants should score all of the Capacity Areas, and all items within each Capacity Area. Skipping sections distorts the data processing template's tabulation of scores. If participants are not sure of an item, they can use the Don't Know option (X).

Technical performance standards

- There is one set of Technical Performance Standards and Scoresheets included in Section III, for HIV/AIDS & OVC. The facilitation process outlined in Section II below does not incorporate administration of this tool.

- To administer this tool, the facilitator follows the same steps presented in Section II. Typically the tool is administered following completion of the Organizational Performance Standards scoring process, prior to data analysis.
- Although Roundtable Discussion Guides are not included for the technical standards, some users develop a mini-Roundtable Guide for the technical area and use this to transition from completing the scoring of Organizational Performance Standards to the discussion and scoring of Technical Performance Standards.
- Some users have found it necessary to implement the Technical Performance Standards tools in a separate session after the workshop because of time constraints. If this is done, it is important to integrate the resulting plans into one overall report.
- Facilitators can adapt the Technical Performance Standards as needed, and can adapt the tools for new technical areas in consultation with PCI IO. Keep in mind that the Excel data analysis template would also need to be modified.

Sample Agenda: Two-day workshop

- The two-day timeframe does not include administering a Technical Performance Standards tool. This can add several hours to the process.
- Facilitators must use their best judgment about how much time a particular group will need, taking into consideration their level of exposure to similar tools and terminology, as well as the skill level of the facilitators. For some groups, three to four days is a more realistic timeframe.
- In addition to the sample agenda below, please see Attachment D, I-STAR Capacity Assessment & Planning Flowchart.

Day One		Day Two	
MORNING		MORNING	
15 mins	Introduction	15 mins	Recap previous day, overview of today's agenda
15 mins	Review of agenda	1 hour	Analysis: Roundtable Discussion
15 mins	Expectations, concerns, norms, logistics	2 hours	Analysis: Performance Standards
2 hours	Assessment: Roundtable Discussion		
AFTERNOON		AFTERNOON	
2-3 hours	Assessment: Performance Standards	1 hour	Planning: Integration of Ideas
15 mins	End of day reflections	40 mins	Planning: Skeleton Plan
		1 hour	Planning: Planning Templates
EVENING		30 mins	Next steps
2-3 hours	Facilitators prepare data reports	10 mins	Feedback

Materials/Equipment

- I-STAR User's Guide
- 1-2 computers with Excel software
- A printer and printer paper
- A photocopy machine
- Colored index cards
- Colored markers
- Tape
- Flip chart paper and flipstands
- Pencils with erasers

Electronic files needed

- Data processing templates
- Roundtable Discussion Report Format
- I-STAR User's Guide (for printing out forms)

Room arrangement

Participants should be seated in a U-shape or circle to facilitate dialogue with each other rather than with the facilitator.

Try to keep the spacing of participants close enough to encourage an informal, relaxed atmosphere.

It is preferable for participants to sit around a table, as they will need to refer to and write on several documents.

Wall space is needed for arranging cards and posting flip charts.

Space is needed for small group work.

Facilitating the I-Star Capacity-Assessment & Planning Workshop

Section II



Opening Session

PURPOSE OF THE WORKSHOP

KEY POINTS

- Over the next few days, we will work together to reflect on the situation of your organization, both its strengths and areas for improvement.
- We will engage in various exercises that help us gain new insights about your organization.
- We will identify together priorities and produce plans for ways that your organization can become even more successful.

If the relationship with the partner is on-going, discuss where this activity fits within the timeline and workplans of the partnership.

Emphasize the importance of open, honest and committed participation.

Remind the group that the process is confidential, no names will be written on forms that are collected or quoted in the workshop report.

Remind the group that this is a “self assessment” and explain what this means.

INTRODUCTIONS

Lead the group in self-introductions.

Do a warm-up question to help build understanding and trust among participants. Example questions: have each participant share something their parents used to tell them, or perhaps describe an item they have with them that reveals something about them.

AGENDA REVIEW & WORKSHOP NORMS

Review the agenda with the group.

Agree on starting and end times, as well as lunch and break times.

Identify workshop rules or norms and post these on a wall. An important norm that must be included is the need for all participants to attend all sessions.

Ask permission for the facilitators to interrupt or redirect conversation as needed to keep the exercises on track.

EXPECTATIONS & CONCERNS

Ask participants to share their workshop expectations and concerns, and record these on a flip chart. Discuss which expectations can and cannot be met by this I-STAR workshop, and address concerns.

Assessment Phase

Activity 1: Roundtable Discussion

Purpose

To help participants begin reflecting on their organization's performance in preparation for a more structured scoring process.

To promote organizational learning by engaging participants in dialogue about critical issues affecting them.

Materials

Cards, markers, computer for note-taking

Preparation

Review the Roundtable Discussion Guide and Roundtable Discussion Report Format (see Section III Tools).

Decide which facilitator will serve as the notetaker. It is not necessary to capture everything said, rather the notetaker should listen for main ideas and key points, and strive to record these using the participants' own words.

Treat the discussion guide as a list of points to cover through natural conversation, as in a focus group discussion. It is better to follow-up with additional probes when a theme comes up rather than re-introduce it later in the discussion.

The order of the items is not important, and it is not necessary to ask every question in the guide.

Time: 1.5 to 2 hours

Facilitation Steps

1: Introduce the purpose of the exercise. Using the Roundtable Discussion Guide, start with the warm-up question, QUESTION #1.

For the remaining questions, begin each question by inviting participants to envision the ideal situation.

- **IDEAL** means their vision for what excellence would look like for an NGO or network for this theme area.
- **REAL** means their prevailing situation.

Participants will naturally transition, in most instances, to discussing how their organization or network compares to the ideal description they've come up with.

- 2: To vary the exercise, alternate large group discussion with dividing participants into pairs or groups of three. Allow five minutes to discuss a single question, then reconvene. It is not necessary to have every group report back, rather invite participants to share in the large group ideas that came up for them.
- 3: At the end of the session, invite participants to break into small groups to identify the three most important ideas that have arisen from the discussion.
- 4: Small Group working time: 20 minutes.
 - Give each group three cards and markers.
 - Instruct each group to write one idea per card. The ideas should be concrete ideas or insights, not summary of the themes that have been discussed so far.
 - Collect the cards. (these will later be incorporated in the Roundtable Discussion Report.)

Activity 2: Performance Standards Scoring

Purpose

To provide participants with an opportunity to rate numerically, on an individual, anonymous basis, how they feel the NGO or network is performing. This information will help the group identify trends that are important for planning capacity-building activities.

Materials

For all participants: a copy of the Organizational Performance Standards tool and Scoresheet, a blank piece of paper (to use as a ruler for the scoresheet), pencils.

Preparation

Make sure you clearly understand all of the terms used in the Performance Standards tool and Scoresheet, and are prepared to give examples for each standard that are relevant for your context and this group. It helps to write these examples in your version of the tool.

Determine how much time the group can spend on each Capacity Area, based on the total amount of time you have for standards scoring, and the number of Capacity Areas in the version of the tool you are using (NGO or Network).

The standards scoring process can become tedious if done the same way for every Capacity Area. Be prepared to vary the process by using exercises such as those in Attachment C, Facilitation Tools, Tips & Tricks. Any exercise can be used for this purpose, not just those listed here, as long as the exercise helps the group reflect on what the standards mean for their organization.

Time: 2 to 3 hours

Facilitation Steps

A) Orient participants to the Performance Standards and Scoresheet

1: HAND OUT THE PERFORMANCE STANDARDS

Explain that the standards represent behaviors that many high-performing NGOs or networks practice regularly. These have been identified through review of international literature on organizational development, as well as through practical experience.

The standards are organized by Capacity Areas.

2: HAND OUT THE SCORESHEET

Instruct participants to not write their name on the scoresheet.

3: EXPLAIN THE THREE DIMENSIONS:

Explain that each standard will be scored using three “dimensions”: Competence, Motivation, and Performance.

Competence and Motivation are factors that contribute to Performance.

You might use this example: Many people want to reduce their weight, but don't succeed. Why not? Generally it is because they are either not sufficiently motivated, or don't have the needed information and skills to make this happen.

Scoring each standard in terms of Competence, Motivation and Practice provides a clearer picture of specific capacity-building needs and opportunities.

The work context or working environment also plays an important role in performance, and this factor will be considered during the analysis phase.

4: EXPLAIN THE SCALE OF 1-10 FOR EACH OF THE THREE DIMENSIONS.

One is the lowest score, 10 is the highest score.

Explain that the scale doesn't refer to “passing grades.”

Introduce the “X” as the “I Don't Know” response, and encourage participants to use this option whenever they feel they do not have enough information to assign a score.

Explain that the Don't Know finding is important as it helps show where more sharing of information might be needed within the organization.

It is preferable for respondents to use the Don't Know (X) option than to guess or base their answer solely on examples provided by other participants during discussion.

B) The Scoring Process

1: Step participants through the scoring process, which consists of the following steps:

- Read each standard aloud
- Invite participants to restate the standard in their own words. Correct any misinterpretations.
- Invite participants to offer specific examples that illustrate whether or how the organization engages in the practice described in the standard. Examples should be relatively recent, e.g. in the past year.
- Invite participants to score the standard using the full scale of 1-10 or “X” for Don't Know.
- Repeat these steps for each standard

- 2: If conducting with a network, remind participants that they are evaluating the network as a whole and not their individual organization's situation. If conducting with an NGO, remind participants they are scoring for their organization, not their individual personal performance.
- 3: One facilitator should circulate and observe participants to make sure that they are entering data correctly on the scoresheet. This should be done at the start and periodically throughout the scoring process.
- 4: After the first two Capacity Areas have been scored, invite participants to volunteer to help with facilitating the remaining Capacity Areas. This will provide variety and keep the process interesting. It also increases participant ownership of the process and creates a more relaxed environment.
- 5: Keep track of the time being spent on each Capacity Area. Move the discussion along so that the scoring stays within the allotted timeframe, but make sure that at minimum each standard is read aloud and interpreted by the participants prior to scoring.
- 6: If energy begins to wane, break the participants into pairs or trios and give them 3-5 minutes to discuss a Capacity Area. After this small group work, they can either discuss again in plenary or move on to individual scoring if time is short. You can also incorporate exercises or energizers as needed, and as time permits (see Attachment C for suggestions.)
- 7: At the conclusion of the scoring, collect the Scoresheets. Double check to make sure all have been completed properly, and number them to make sure you have one for each participant.
- 8: Invite participants to comment on what they have learned so far about their organization and what they think about the process they have just experienced.

C) End of Day

- 1: Thank participants for their good work, and give highlights of the next day's program.
- 2: Facilitators now transition to data processing and report preparation, which is done by the facilitation team only.

Activity 3: Reports Preparation

Purpose

To synthesize data produced during the roundtable discussion and standards scoring processes into formats that can be used by the group for analysis on day two.

Materials

2 computers, printer, photocopy machine, Excel data processing template, completed scoresheets, notes and cards from roundtable discussion, Roundtable Discussion Report Format (NGO or network).

Preparation

Facilitators should prepare to conduct the steps below in the evening, after participants have left.

If 2 computers are available, the reports can be prepared simultaneously, with one facilitator working on each.

Time: 2 to 3 hours

Steps

A) To create the Roundtable Discussion Report

- 1: Create a blank report format from the sample (see Tools Section III).
- 2: Go through the discussion notes and highlight all the ideal statements, then cut and paste them into the ideal box for the relevant theme section.
- 3: Once all the ideal statements have been transferred, what remains should be the real statements. Cut and paste all the real statements into the real box for the relevant theme.
- 4: Delete all repetitive or confusing information.
- 5: Incorporate the statements on the cards that were produced by the small groups at the end of the roundtable discussion.
- 6: The report should be no more than 4 pages (2 double-sided pages). Make one copy for each participant and facilitator. The report will be distributed to participants during the Analysis phase.

B) The Performance Standards Score Report

- 1:** Input scoresheet data and produce reports using using the Excel data processing template (see Attachment B for instructions on how to use the Excel template).
- 2:** The report is compiled by printing and stapling together the following outputs produced by the Excel template:
 - Summary Bar Chart
 - Item Analysis
 - Don't Know Report
- 3:** Make one copy of the compiled report for each participant and facilitator. This report will be distributed during the Analysis phase.

C) Reviewing results

Prior to starting the Analysis activities with the group, the facilitators should review together the findings in the Roundtable Discussion Report and the Performance Standards Score Report, and discuss their observations.

Analysis Phase

Activity 4: Analysis of Roundtable Discussion Report

Purpose

To gain insights from the roundtable discussion and translate them into actions the NGO or network can take to strengthen its performance.

Materials

Copies of the Roundtable Discussion Report for each participant, copies of the Activity 4 small group exercise instructions (Attachment A), cards, markers, tape, flip charts.

Time: 1 hour

Facilitation Steps

- 1: Distribute the Roundtable Discussion Report to participants.
- 2: Form small working groups of 3-4 participants each. Give each group the Activity 4 small group instructions, markers and cards.
- 3: Small group working time: 30 minutes
 - Instruct each group to review the findings and generate 3-5 concrete, action-oriented suggestions or specific actions that build on ideas generated in the roundtable discussion.
 - The groups should write each idea on its own card, in large enough letters so that it can be read by others if posted on the wall.
 - One color should be used by all the groups to draw a border around each card. This frame will be used later to distinguish cards generated in this session from subsequent sessions.

Facilitators should circulate among the groups and ensure that the instructions are understood, and that the suggestions groups come up with are sufficiently concrete and action-oriented. For example, it is not enough to say "communication needs to be improved". The group should suggest specific mechanisms or activities to do so.

- 4: Reconvene participants in plenary and invite each group to share its work. Each group can post their cards on the wall when presenting.
- 5: While each group is presenting, one facilitator should type the ideas from the cards, and have this ready as a handout for use by small groups during the Integration of Ideas stage below (Activity 6).

Activity 5: Analysis of Performance Standards Score Report

Purpose

To identify performance patterns produced by the quantitative data, and explore factors contributing to them.

To translate findings into actions the organization can take to strengthen itself.

Materials

One copy for each participant of the Performance Standards Score Report, copies of the Activity 5 small group instructions (Attachment 1), markers, cards, flip charts, tape.

Time: 2 hours

Facilitation Steps

A) Summary Bar Chart

- 1: Distribute the Performance Standards Score Report to participants.
- 2: Use the Summary Bar Chart to help participants get comfortable reading the data. Guide the group through interpreting the Summary Bar Chart using the following questions:
 - Which Capacity Areas seem to have the highest overall scores, and which the lowest?
 - In which Capacity Areas is the organization especially competent? How was this expertise developed?
 - Which are the organization's strongest areas of performance? What in the organization's history might explain why performance is so strong in these areas?
 - What general observations can you make about motivation? How do you explain the pattern that was observed here?

B) Item Analysis

- 1: Turn to the Item Analysis page for the first Capacity Area.
- 2: To help the group analyze the data, lead them through the following analyses.
 - The Rule of One: Score differences of $>$ or $= 1$ represent a significant finding. Ask the group to identify some significant gaps between bars.
 - Identifying Highs & Lows: Where are our greatest strengths? Which are our lowest scoring standards or dimensions?

3: Looking for Untapped Potential:

For which standards is competence significantly higher than performance?

- Why is this the case?
- Is low motivation a factor?
- Is there something in the work environment that might contribute to this pattern? (define "work environment" with the group)

For which standards is motivation significantly higher than competence or performance?

- Why is this the case?
- What in the work environment contributes to this situation?
- What can be done to build on the high motivation to achieve higher performance?

Are there standards for which competence and motivation are high, but performance is lower?

- Why is this the case?
- What might be contributing to this?
- Have there been recent changes related to this standard, and performance just hasn't caught up yet? What else could be going on?
- What actions could help boost performance?

4: Identify Quick Wins:

- Given what we've learned about this Capacity Area, where are the best opportunities for "quick wins"?
- Where could a relatively small investment of human or other resources result in significant improvement in this area? When making this decision, consider both facilitating factors and barriers to change.

5: To complete the process for all Capacity Areas, break into small groups and repeat the analysis steps above for each Capacity Area.

6: Small group working time: 45-60 minutes.

- Break into 3-4 small groups, and assign each group 2-3 Capacity Areas to repeat the analysis process with (steps 2, 3 and 4 above).
- Groups should capture their conclusions on a separate flip chart page for each Capacity Area.

6: Reconvene, and have small groups present their findings to the large group. Use the discussion to change any findings that the larger group doesn't agree with, or to amplify what the small group has presented.

7: Introduce the Don't Know report.

- Explain that for standards appearing on this report, there was a significant number of Don't Know responses.
- Ask the group what the implications are of a high Don't Know score for this standard.
- Ask the group if they think it is a problem that most participants don't have enough information on that standard to score it, or if this acceptable given the nature of the standard.
- If they consider this a problem, elicit recommendations on how to address it.
- Integrate their recommendations into the flip chart notes for the relevant Capacity Area.

8: The group is free to disagree with any of the score patterns. Comments on problematic findings should be recorded, as well as the group's thoughts on why they consider the finding to be problematic. For example, if the Don't Know was high for that standard, the score could be distorted. These notes should be inserted in the complete workshop report as 'supplemental notes' on the Performance Standards Score Report.

Planning Phase

Activity 6: Integration of Ideas

Purpose

To compare and integrate insights generated from analyzing the Roundtable Discussion Report with insights gained from the Standards Scoring Report. This comparison helps to validate findings from these separate processes, and to begin assigning priorities for capacity-building intervention.

Materials

Copies of Activity 6 instructions for small groups (Attachment 1), markers, cards, tape

Time: 1 hour

Facilitation Steps

- 1: Divide participants into 3-4 small groups. Each group will be responsible for 2 Capacity Areas. Distribute to each group:
 - the flip chart pages from the Performance Standards Score Report discussions for the Capacity Areas the group will work on.
 - the typed copy of the text from the cards posted on the wall (produced during the analysis of the Roundtable Discussion Report).
- 2: Small group working time: 45 minutes
 - Ask each small group to discuss the information generated so far for their 2 Capacity Areas, and make new cards with ideas that augment or complement the existing cards.
 - Groups do not need to limit their ideas to what is already written on the flip charts and cards, they should feel free to further distill the ideas already presented into new insights.
 - Each idea should be written on one card as a concrete, action-oriented idea or recommendation.

Facilitators should circulate among the groups to assist as needed.
- 3: Reconvene large group. Ask each small group to post its cards on the wall and present its work. Encourage participants to discuss and debate the ideas presented.

Activity 7: Developing a Skeleton Plan

Purpose

To look creatively for ways to group the recommendations represented on the cards. To further refine recommendations based on feasibility and shape them into a skeleton capacity-building plan.

Materials

Cards, markers

Time: 40 minutes

Facilitation Steps

- 1: Form a new work group that consists of one representative from each of the small groups.
- 2: Small group working time: 15-20 minutes
 - Ask the group to arrange in logical groupings all the cards that have been generated to form a skeleton plan. Do this by re-arranging the cards on the wall and eliminating duplicates.
 - Prepare a title card for each thematic grouping of cards. The title cards should be framed with a different color than has been used before.
 - While this group is working, others can observe quietly, or take a break.
- 3: Reconvene the whole group, and have the small group explain their work.
 - Participants should review the skeleton plan and propose any required modifications.
 - Have participants stand near the wall for this activity, so that they can see the cards clearly and move the cards as needed based on the discussion.
- 4: Ask participants to comment on obstacles that will need to be overcome to achieve the recommendations, and factors that could help facilitate achievement. Write these on a flip chart. In cases where there are many obstacles and few facilitating factors associated with a card, the facilitator should guide the group to reconsider this recommendation.
- 5: The facilitator should challenge the group to consider:
 - Are the suggestions consistent with the findings?
 - Are the suggestions feasible and not overly ambitious in light of other organizational commitments?
- 6: A facilitator should type the entire skeleton plan for inclusion in the report. It can be typed as a simple list.

Activity 8: Completing the Action Planning

Purpose

To identify priority areas to focus on for capacity-building.
To develop workplans to achieve priorities.

Materials

Copies of the Action Planning Worksheets

Time: 1 hour

Facilitation Steps

- 1: Using the skeleton plan, facilitate participants to decide on 3-5 priority areas to focus capacity-building interventions on over the next 12 months. Priorities should be based on what is most likely to succeed and realistic given organizational resources.
- 2: Once priority areas are agreed upon, distribute and review the Action Planning Worksheet.
- 3: Small group working time: 30 minutes.
 - Divide into one small group for each of the priority areas identified.
 - For each priority, ask each group to complete an Action Planning Worksheet.
- 4: In plenary, each group can share its plan and incorporate feedback from the large group.

Wrap-up of I-STAR Session

Activity 9: Next Steps

Purpose

To identify actions that will be taken to ensure that achievements from the workshop are followed up and supported.

Materials

Flip charts, markers

Time: 30 minutes

Facilitation Steps

- 1: In plenary, discuss and record the steps that must be taken to share the outcomes of the workshop within the organization, and gain the support of organizational leaders for the plans developed.
 - Who must be consulted?
 - Where and when will this consultation take place?
 - Who, from among those who participated in today's exercise, will be responsible for sharing the output with others? How will they do this?
- 2: Discuss ways in which the plans produced differ from or reinforce other planning efforts of the organization, and what steps are needed to integrate these plans. Consider in particular internal processes such as strategic and operational planning, and how the I-STAR findings might be integrated into these.
- 3: Recap on a flip chart the key next steps that must be taken to build on the work started during the I-STAR session.
- 4: Facilitators should explain that they will prepare and submit the workshop report to participants and senior leaders within 30 days, and what the report will include. Set a date for report submission.
- 5: The local PCI representative should comment on how the work done in this session will fit into the broader picture of the collaboration with PCI (if there is an ongoing capacity-building partnership).

Activity 10: Feedback

Purpose

To solicit and document participant's response to the workshop experience.

Materials

Flip charts, markers

Time: 10 minutes

Facilitation Steps:

- 1: Invite participants to identify something new that they learned about their organization through this process.
- 2: Invite participants to comment on the process. What did they especially enjoy? How can it be improved?
- 3: Conclude with a round of applause, thanking participants for their participation, and commending them on all they have accomplished.

Post-workshop Follow-up Activities

Workshop Report

Facilitators should prepare an I-STAR workshop report and submit to the organization within 30 days. It is important to submit this report promptly to keep motivation high.

The report format can be modified based on the local situation, but should include these elements:

- Overview of the context and purpose of the workshop.
- Notes on preparatory meetings and prior agreements with the organization.
- Overview of the general process, including explanation of how participants were selected. Be careful to not name participants.
- Agenda.
- Expectations: incorporate the list from the beginning of the process, and any decisions made about what could or could not be covered in the workshop.
- Roundtable Discussion Report.
- Performance Standards Score Report: include supplemental notes as needed on findings the group rejected and possible explanations for these findings.
- The Skeleton Plan.
- The Action Planning Worksheets.
- The group's feedback on the process.
- Summary of commitments and next steps.
- Facilitator's suggestions or recommendations for the group.
- Expression of appreciation to the organization for their participation in the process.
- Attachment for network only: list of organizations that participated.

Building ownership of the results

The participants in the assessment and planning activities represent a sample of the NGO's staff or the network's members. It is therefore imperative to schedule time after the workshop to review the outcomes with senior leaders, and to plan the next steps for launching capacity-building initiatives.

Allow adequate time to help leaders understand the data and the plans produced. Building ownership among senior leaders is critical for ensuring that plans developed during the workshop are followed through.

To foster implementation of the plans, the organization should be assisted to develop a process for monitoring achievements, and for obtaining assistance as needed to implement their plans.

Re-assessment & planning

Given the highly qualitative nature of the data produced by capacity self-assessment methodologies, it is not advisable to attempt to measure organizational change quantitatively over time by comparing scores from repeated assessments.

Factors that confound a comparison of self-assessment scores over time include the likelihood that as staff grow in their understanding of the capacity areas and standards as a result of capacity-building, they may see shortcomings they didn't before, and may in fact score their organization lower on some standards than during the initial assessment (response shift bias). Staff turnover makes it unlikely that the same group of people will take part in subsequent assessments, and variability in the skills of assessment facilitators, including the degree to which a facilitator can build clarity and consensus about the definition of each standard, also contribute to challenges in comparability of results.

The results from repeated administrations are therefore more appropriately reviewed qualitatively, supplemented with other sources of information to help in understanding trends in the organization's relative strengths and challenges over time.

As part of the monitoring and evaluation approach, capacity building objectives can be translated into Quality Improvement Verification Checklists (QIVC). Standards prioritized through the assessment and planning process can be restated as QIVCs and then used as part of the organization's ongoing supervisory and monitoring systems. Through the use of such checklists, progress in building organizational capacity can be verified through observation, and more quantitative measures of quality improvement can be possible. Progress can then be reviewed on a periodic basis, and capacity-building plans revised as needed based on the results.

Tools

Section III



Roundtable Discussion Guide: NGO

1. Ideas about NGOs in general

- What is an NGO?
- What are the important contributions that NGOs can make to their sector or communities?
- What are some of the challenges or limitations that NGOs face?
- What factors contribute to NGO sustainability?

2. Participation

- How does this NGO involve the community in its work?
- What other stakeholders are involved in its work?
- What are the benefits for communities and other stakeholders in participating in the work of this NGO?

3. Decision-making process

- How are major decisions made?
- What mechanisms are used to make important decisions?
- How is disagreement handled?

4. Sense of unity

- How are organizational goals and priorities established?
- How is shared commitment created for organizational goals and priorities?

5. Human resources

- How are qualified staff attracted to the organization?
- How are volunteers attracted?
- What is done to retain qualified staff and volunteers?
- Is there a sense of equity in the representation and participation of women and men?

6. Community services

- What services are provided to the community?
- What services does the community expect from the NGO?
- How does the NGO decide which services to offer?
- What is the quality of services provided?
- How are the needs of women and other vulnerable groups being addressed by the NGO?

7. NGO value

- Who benefits from the NGO?
- What benefits are received?
- Who is the NGO accountable to for its successes or shortcomings?

Roundtable Discussion Guide: Network Version

1. Ideas about networks in general

- What is a network?
- Why do organizations join or form networks?
- What are some of the most important contributions that networks can make?
- What are some of the challenges or limitations that networks face?
- What does sustainability mean for a network?

2. Nature of participation

- What does “participation” mean?
- How is participation in the network stimulated?
- What are the benefits of participation for members?
- Is there a difference in participation between women and men?
- Is there a difference in participation between different types of organizations?

3. Decision-making process

- Who makes key decisions for the network?
- What mechanisms are used to make decisions?
- How is disagreement handled?

4. Sense of unity as a network

- How is shared vision and commitment created for common purposes?
- When is it good to have differing views?
- When is it important to have convergence of views?
- What are the strongest points of convergence/divergence for this network?

5. Composition of the network

- What kinds of institutions participate in the network?
- What is the role of donors within the network?
- What linkages exist between communities and the network?
- Should all network members be entitled to “voice and vote”?

6. Recruitment and retention of members

- What are the mechanisms for bringing new members into the network?
- What are the mechanisms for keeping members engaged in the network?

7. Services network offers to members

- What are the services a member can receive from the network?
- What is the quality of these services?
- What are the services that members expect of the network?
- How are decisions made about which services the network can offer?

8. Network value

- Who benefits from the network?
- What benefits are received?
- Who is the network accountable to for its successes or shortcomings?

Roundtable Discussion Report Format: NGO

1. What is an NGO?

Key Ideas:

-
-
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-

2. PARTICIPATION

IDEAL

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-

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-

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REAL

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3. DECISION-MAKING

IDEAL

-

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-

REAL

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-

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-

-

-

4. SENSE OF UNITY

IDEAL

-

-

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-

-

REAL

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5. HUMAN RESOURCES

IDEAL	REAL
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6. COMMUNITY SERVICES

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7. NGO VALUE

IDEAL	REAL
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8. Other Key Discussion Points:

Roundtable Discussion Report Format: Network

1. What is a network?

Key Ideas:

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2. NATURE OF PARTICIPATION

IDEAL

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REAL

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3. DECISION-MAKING

IDEAL

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REAL

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-

4. SENSE OF UNITY AS A NETWORK

IDEAL

-
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-

REAL

-
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-
-

5. COMPOSITION OF THE NETWORK

IDEAL	REAL
•	•
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•	•
•	•

6. RECRUITMENT AND RETENTION OF MEMBERS

IDEAL	REAL
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•	•

7. SERVICES NETWORK OFFERS TO MEMBERS

IDEAL	REAL
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8. NETWORK VALUE-ADDED

IDEAL	REAL
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9. Other Key Discussion Points:

Organizational Performance Standards: NGO

A. Program Design Quality

- 1 We gather information that helps us tailor services to local conditions and needs.
- 2 We design programs that reflect a thorough understanding of local knowledge and successful practices.
- 3 We design our programs to ensure that males and females benefit equitably from our services.
- 4 We actively engage clients in our program design process.
- 5 We actively engage other stakeholders in our program design process.
- 6 We gather and apply relevant technical information to our program designs.

B. Partnering, Advocacy & External Relations

- 1 We participate in networks or other groups that support our advocacy goals.
- 2 We create opportunities for the private and public sector to support our work in ways other than just financial.
- 3 We create opportunities for us and our partners to learn from each other.
- 4 We build partnerships with organizations that have complementary skills and values.
- 5 We share leadership roles and responsibilities with our partners.
- 6 We use partnership agreements that promote two-way accountability between us and our partners.

C. Financial Management & Administration

- 1 We use financial controls to regulate cash disbursements and purchases.
- 2 We regularly track our expenses against our budgets.
- 3 We take measures to ensure that our budgets reflect our organization's strategic priorities.
- 4 We produce financial records that are timely, accurate and can be accessed by relevant staff.
- 5 We prepare budgets that include reasonably accurate projections of revenue and expenses.
- 6 We clearly document our finance and administration policies and procedures.

D. Human Resource Management

- 1 We act in full compliance with local employment laws.
- 2 We staff our organization in a way that allows us to meet workflow needs.
- 3 We secure and retain the services of qualified individuals.
- 4 We provide employees with constructive feedback through a formal performance review process.
- 5 We provide staff with opportunities to develop skills in areas that are critical to job performance.
- 6 We promote diversity through our hiring practices.

E. Governance & Strategic Direction-Setting

- 1 We develop plans that take political, economic and social trends into account.
- 2 We compare our organizational strengths and weaknesses to other groups working in our area when making decisions about our future direction.
- 3 We involve Board and staff in setting our organization's future direction.
- 4 We use our strategic plan as a guide for organizational decision-making.
- 5 We take actions to build staff commitment to our mission, values and philosophy.
- 6 Our organization pursues only those funding opportunities that are consistent with our mission, values and strategic priorities.

F. Staff Empowerment & Participation

- 1 We hold regularly scheduled staff meetings that promote open and productive dialogue.
- 2 Our leadership fosters staff participation in decision-making.
- 3 Our organization ensures that there is equitable participation of women and men in leadership and decision-making.
- 4 We provide staff with multiple and varied opportunities to assume leadership roles.
- 5 Our organization promotes effective teamwork.
- 6 Our organization gathers input from multiple sources before reaching important decisions.

G. Resource Mobilization

- 1 We use an internal proposal review process that involves multiple reviewers.
- 2 We provide our contributors with compelling information on how their support improves the lives of those we serve.
- 3 Our organization monitors the ratio of fundraising costs to revenues generated.
- 4 We take measures to diversify our sources of funding so that we don't rely on any one donor for more than 60 percent of our income.
- 5 Our organization thanks and recognizes supporters in ways that are meaningful to them.
- 6 Our organization offers a variety of ways for individuals and institutions to support our work.

H. Organizational Learning

- 1 We design and implement activities that address our identified learning priorities.
- 2 We encourage staff to suggest and try new approaches for achieving organizational goals.
- 3 We engage in information-sharing and dialogue with field staff on how to improve program quality.
- 4 We use well-defined indicators to measure our progress in achieving expected program results.
- 5 We foster a climate of trust and openness that contributes to individual and organizational learning.
- 6 We identify, disseminate and apply "best practices" that are relevant to our work.

Scoresheet: NGO

	COMPETENCE (C)	MOTIVATION (M)		PRACTICE (P)	
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree are we motivated to succeed at this standard?		To what degree is our performance successful for this standard?
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond. I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10	X	1 to 10 X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We are very motivated to implement this standard successfully.		We consistently implement this standard well.
A. Program Design Quality					
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B. Partnering, Advocacy & External Relations					
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C. Financial Management & Administration					
13					
14					
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16					
17					
18					
D. Human Resource Management					
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24					

	COMPETENCE (C)		MOTIVATION (M)		PRACTICE (P)	
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree are we motivated to succeed at this standard?		To what degree is our performance successful for this standard?	
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10	X	1 to 10	X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We are very motivated to implement this standard successfully.		We consistently implement this standard well.	
E. Governance & Strategic Direction-Setting						
	25					
	26					
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F. Staff Empowerment & Participation						
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G. Resource Mobilization						
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H. Organizational Learning						
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	48					

Organizational Performance Standards: NETWORK

A. Network Learning

- 1 We use formal procedures to evaluate member learning needs.
- 2 We provide capacity-building activities that address member learning needs.
- 3 We maintain multiple methods of communication (e.g. publication of periodicals, training, informative meetings) to promote learning throughout the network.
- 4 We use evaluation results to improve the performance of the network.
- 5 We regularly evaluate member satisfaction with the network.
- 6 We use information collected from member surveys to make adjustments in the activities and policies of our network.

B. Planning

- 7 We analyze information obtained from diverse sources to identify the emerging trends relevant to our sector focus area(s).
- 8 We provide members and other key stakeholders with timely information about the emerging trends relevant to our sector focus area(s).
- 9 We maintain a database of critical information relevant to our sector focus area(s) or mission.
- 10 We use our database to guide the development of work plans and advocacy activities.
- 11 We involve members and other key stakeholders in open dialogue during the development of our strategic and other long-term plans.

- 12 We involve potential beneficiaries in open dialogue during the development of activities.

C. Quality Control

- 13 We actively seek information about best practices in our sector focus area(s).
- 14 We use information on best practices to develop or promote technical quality standards that will be used by members and other key persons.
- 15 We monitor our progress on planned activities through the establishment and measurement of well-defined goals and clear standards.
- 16 We evaluate our performance as a network against well-defined goals and standards.
- 17 We analyze information obtained from diverse stakeholders to evaluate network performance.

D. Advocacy

- 18 We involve our members and other key stakeholders in open dialogue to determine our advocacy priorities.
- 19 We use a consensus-building process among members and other key stakeholders to determine our advocacy priorities.
- 20 We maintain close and cooperative relations with policy-makers whose support we need for the achievement of our advocacy objectives.
- 21 We develop collaborative relationships with actors outside of our sector focus area(s), in order to advance our advocacy objectives.

22 We gather feedback from policy-makers to determine whether the information we share with them is useful for determining future policy objectives.

23 We communicate to our advocacy audience detailed and specific information about the investments and expenses that are needed in our sector focus area(s).

E. Generating Resources

24 We develop and implement plans to generate funds that will contribute to network sustainability.

25 We mobilize resources from within our membership to contribute to network sustainability.

26 Our fundraising efforts emphasize the unique benefits and role the network plays in contributing to the development of our sector focus area(s).

27 We involve members in discussions about the kinds of member organizations that should be actively recruited into the network.

28 We follow a clearly defined process for recruiting new members into the network.

F. Leadership

29 We provide equitable opportunities for women and men to play a leadership role within the network.

30 We use participatory and transparent processes to make important decisions.

31 We resolve conflicts among members by involving them in constructive dialogue.

32 We build consensus among members when making important decisions.

Scoresheet: NETWORK

	COMPETENCE (C)	MOTIVATION (M)	PRACTICE (P)
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree is our performance successful for this standard?
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.
		I do NOT have sufficient information to respond.	I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10
			X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We consistently implement this standard well.
A. Network Learning			
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B. Planning			
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C. Quality Control			
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D. Advocacy			
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	COMPETENCE (C)		MOTIVATION (M)		PRACTICE (P)	
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree are we motivated to succeed at this standard?		To what degree is our performance successful for this standard?	
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10	X	1 to 10	X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We are very motivated to implement this standard successfully.		We consistently implement this standard well.	
E. Generating Resources						
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F. Leadership						
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Technical Performance Standards: HIV/AIDS & OVC

A: Services for People Living with HIV/AIDS & their Families

- 1 We take specific measures to reduce stigma associated with HIV/AIDS.
- 2 We bring health care and emotional support services to clients' homes.
- 3 Our programs increase clients' access to appropriate, quality health care.
- 4 We ensure that clients and their families have adequate skills for HIV/AIDS care and prevention.
- 5 We work to increase access to nutritious food for people living with HIV/AIDS and their families.
- 6 We work with other service providers to ensure an effective referral system for people living with HIV/AIDS and their families.
- 7 We provide counseling services tailored to the needs of our clients and their families.
- 8 We ensure that all people living with HIV/AIDS and their families have access to empowering support groups.
- 9 We build the skills of HIV positive people to advocate for their rights.
- 10 We provide services specifically designed to help our clients generate income.
- 11 We take measures to reduce depression and improve the emotional well-being of people living with HIV/AIDS and their families.
- 12 We work to increase clients' access to anti-retroviral treatment.

B. HIV/AIDS Education & Prevention

- 1 We use a variety of channels to communicate basic information about HIV prevention to community members.
- 2 We tailor our prevention messages and activities to the specific needs of the different types of people at risk that we serve.
- 3 We combine individual and group processes to foster behavior changes that reduce risk of HIV infection.
- 4 We take specific actions to change community beliefs and practices that contribute to the spread of HIV.
- 5 We foster programs of peer-to-peer support and education for behavior changes that reduce the spread of HIV.
- 6 We take specific measures to promote workplace and government policies conducive to HIV prevention.
- 7 We work to make condoms accessible and acceptable to individuals at risk.
- 8 We educate and motivate people to seek early clinic-based care for sexually transmitted infections.
- 9 We take measures to increase access to and use of voluntary, confidential HIV counseling and testing.
- 10 We monitor the population we serve to ensure that our services are directed to those most at risk.
- 11 We work with other service providers to integrate the delivery of HIV prevention, care and support services.

12 We facilitate access to services that prevent transmission of HIV from mother to child.

C. Orphans & other Vulnerable Children

1 We take specific actions to ensure that the legal rights of orphans and other vulnerable children are protected.

2 We train and motivate community members to take action to meet the needs of orphans and other vulnerable children.

3 We take specific measures to ensure that orphans and other vulnerable children live in safe and nurturing environments.

4 We provide services that increase access of orphans and other vulnerable children to health care and nutritious food.

5 We provide opportunities for orphans and other vulnerable children to continue their education in formal and non-formal education settings.

6 Our programs equip orphans and other vulnerable children with skills and opportunities to generate income.

7 We work to reintegrate street children with their families wherever possible.

8 Our programs provide psychosocial counseling tailored to the needs of orphans and other vulnerable children.

9 We strengthen the ability of vulnerable families to care for and support their children.

10 We work with other service providers to build and strengthen service referral systems for orphans and other vulnerable children and their families.

11 We equip orphans and other vulnerable children with knowledge and skills for avoiding HIV infection.

12 We work to build the self-esteem of orphans and other vulnerable children.

Scoresheet: HIV/AIDS & OVC

	COMPETENCE (C)		MOTIVATION (M)		PRACTICE (P)	
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree are we motivated to succeed at this standard?		To what degree is our performance successful for this standard?	
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10	X	1 to 10	X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We are very motivated to implement this standard successfully.		We consistently implement this standard well.	
A: Services for People Living with HIV/AIDS & Their Families						
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B: HIV/AIDS Education & Prevention						
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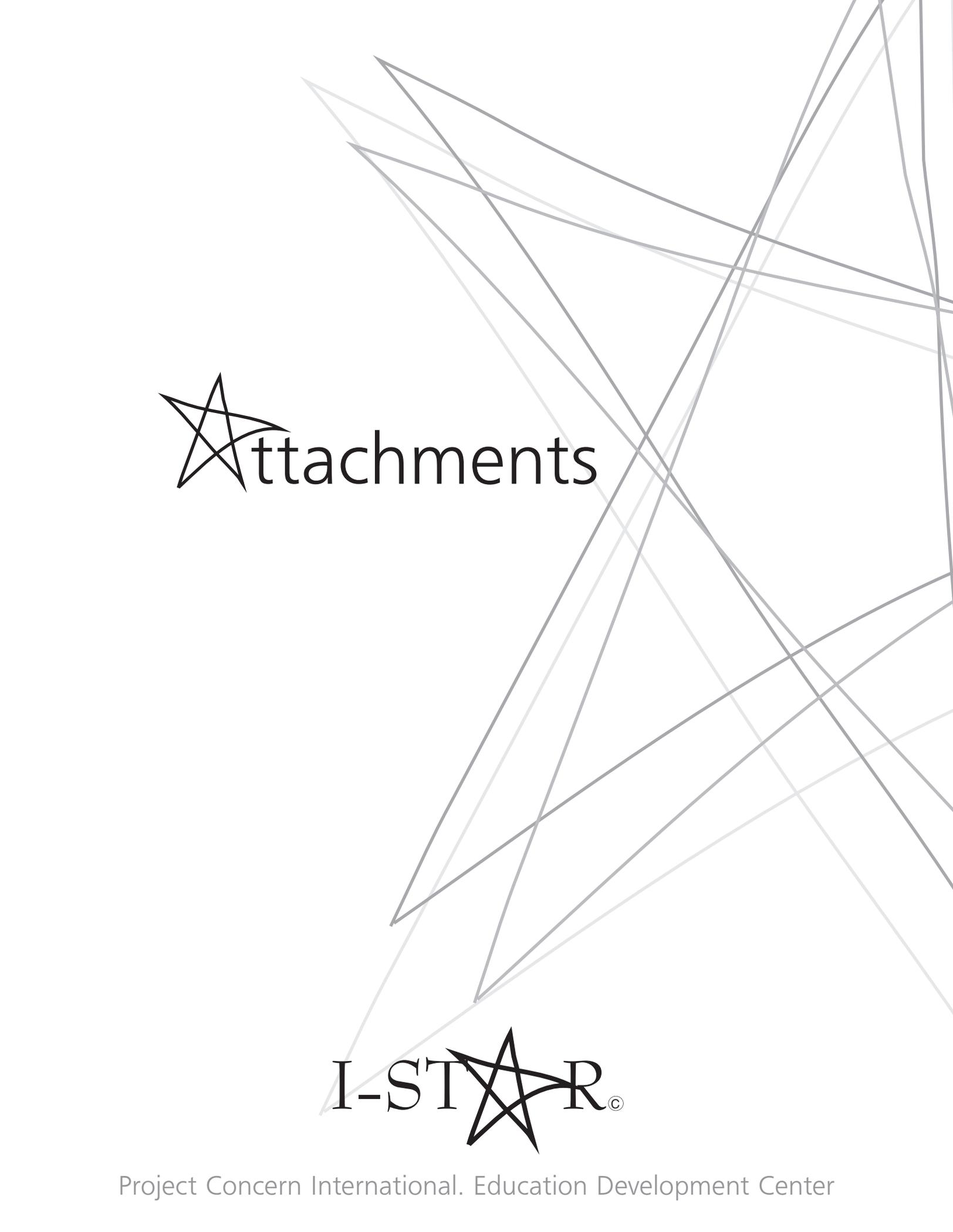
	COMPETENCE (C)		MOTIVATION (M)		PRACTICE (P)	
Consider this question →	To what degree do we have the knowledge and skills to implement this standard?		To what degree are we motivated to succeed at this standard?		To what degree is our performance successful for this standard?	
Decide →	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.	I do have sufficient information to respond.	I do NOT have sufficient information to respond.
Use this scale →	1 to 10	Mark "X"	1 to 10	X	1 to 10	X
Where 10 signifies →	We are very capable of implementing this standard successfully.		We are very motivated to implement this standard successfully.		We consistently implement this standard well.	
C: Orphans & other Vulnerable Children						
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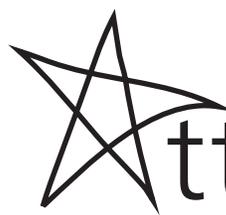
Action Planning Worksheet

Priority Issue:

Expected Outcome:

Actions	Resources required	Key people responsible	Time Frame
<p>Short-term Activities (next 30 days):</p>	<p>Available:</p> <p>To be secured:</p>		
<p>Additional Activities (12 months):</p>	<p>Available:</p> <p>To be secured:</p>		
<p>Additional Information needed in order to carry out more detailed planning:</p>			



 Attachments

I-STAR[®]

Attachment A

Small Group Instruction Handouts

Make one of these handouts for each small group. Cut into strips so that each Activity's instructions are on a separate piece of paper. Hand out when you begin the exercise.

ACTIVITY 4 ANALYSIS OF ROUNDTABLE DISCUSSION REPORT

- Review the findings and generate 3-5 concrete, action-oriented suggestions or specific actions that build on ideas generated in the roundtable discussion.
 - Write each idea on its own card, in large enough letters so that it can be read by others if posted on the wall. Color the edges of each card, to create a 'frame' for the card.
-

ACTIVITY 5 ANALYSIS OF PERFORMANCE STANDARDS SCORE REPORT

ITEM ANALYSIS

Rule of One: Identify score differences of $>$ or $= 1$ (significant gaps).

Highs & Lows: Where are our greatest strengths? Which are our lowest scoring standards or dimensions?

Untapped Potential:

For which standards is competence significantly higher than performance?

- Why is this the case?
- Is low motivation a factor?
- Is there something in the work environment that might contribute to this pattern?

For which standards is motivation significantly higher than competence or performance?

- Why is this the case?
- What in the work environment contributes to this situation?
- What can be done to build on the high motivation to achieve higher performance?

Are there standards for which competence and motivation are high, but performance is lower?

- Why is this the case?
- What might be contributing to this?
- Have there been recent changes related to this standard, and performance just hasn't caught up yet? What else could be going on?
- What actions could help boost performance?

- Quick Wins:**
- Based on the analysis above, what are the best opportunities for "quick wins"?
 - Consider facilitating factors and barriers to change.

ACTIVITY 6 INTEGRATION OF IDEAS

- Refer to the flip charts produced for the Item Analysis, and the handout summarizing cards produced during analysis of roundtable findings.
 - Discuss the information generated so far for your assigned Capacity Areas.
 - Make new cards with ideas that augment or complement the cards already made.
 - Feel free to add new ideas to those already presented.
 - Write each idea on a card. Phrase as a concrete, action-oriented idea or recommendation.
-

Attachment B

Using the Excel Data Processing Spreadsheet

Processing the Standards Scoring data using the Excel templates

Data is processed using the data processing template Excel file. Select the appropriate version, NGO or network (or technical module). Once you have entered the data, the template automatically processes the data and produces the needed score reports.

- Before entering data, save the blank template as a new file, and name it in a way that indicates the organization whose data is being inputted, the date, and which tool (for example, "PCI India ISTAR data Jul 05 NGO").
- Along the bottom of the file are tabs that help you navigate. Use the arrow buttons at the left bottom corner of the screen to scroll through the tabs.
- The first three tabs are highlighted and have "+" signs in their names to indicate that these are the key output files you will use with partners to share results (+Summary Bar Chart, +Item Analysis, +Don't Know Table).
- The tabs that follow to the right are more detailed analysis forms and the worksheets you will use to enter respondent data.

To enter data, use the right arrow to get to the tab labeled "Detailed Results".

- At the top of this page, on the far right is a column labeled "Number of Respondents". Change the number in this field to reflect the actual number of respondents you will be entering data for.
- Use the right arrow at the bottom of the screen, on the left, to get to the tab that says "Respondent 1". On this form enter the data for the first scoresheet.
- Use the tab or arrow keys to move from column to column.
- The data is automatically saved as you move from sheet to sheet, however it is advisable to save the entire file periodically.
- Continue to enter data for all respondents. The template can accommodate up to 20 respondents.
- When you finish entering for all respondents, the template will automatically produce the outputs. Just use the tabs to get back to the first tab, +Summary Bar Chart. The print format for the Summary Bar Chart, the Item Analysis, and the Don't Know Tables are preset.

The Standards Scoring Reports

- **SUMMARY BAR CHART:** shows the organization's average score for each Capacity Area by dimension (i.e., Competence, Motivation, Performance).
- **ITEM ANALYSIS:** shows the average score by dimension for each standard, and summary data for each Capacity Area. There is one bar chart per Capacity Area.
- **DON'T KNOW TABLE:** highlights standards for which more than 30% of respondents answered "I don't know" by scoring an "X". If a number appears on the Don't Know Table, this means that there was a significant level of "don't know" response (the number indicates the exact percentage of respondents who chose this option).
- **SCORE SUMMARY TABLE:** shows average score and ranking of each Capacity Area.

Attachment C

Facilitation Tools, Tips & Tricks

Introduction

The facilitator should promote participation, focus the discussion and foster a friendly and nurturing environment where respondents freely contribute to the assessment. The facilitator should not act as an authority figure and must be careful to render honest and faithful interpretations of respondents' perspectives. Distortions can be created when a facilitator magnifies details or belittles sources of organizational tension. A facilitator should be open to all discussion and allow respondents the opportunity to focus on their concerns without deviating too far from discussion of the standards, which is the facilitator's most difficult task.

One of the hardest aspects of facilitation is learning how to deal with silence in response to a question you pose. Get comfortable with silence by counting to 15 silently. It often takes time for group members to organize their thoughts and then achieve the necessary comfort level to share them. Once a few people speak up, others will generally follow. When comments begin, treat each one with respect. To speak up in a group session involves at least a little bit of risk for participants. If they feel you may dismiss or criticize their comments, they may choose to not speak up at all.

Facilitator Values

Within the I-STAR framework, facilitation works best when certain values are accepted and practiced not only by the facilitator, but by the entire group. It is the facilitator's responsibility not only to demonstrate these values in his or her own behavior, but to foster them in the group. These values include:

DEMOCRACY: Each member has something to contribute to the group and is provided a fair opportunity to do so. The agenda is designed to meet participants' needs and is open to participant changes. For the period of time during which the facilitator is working with the group, no hierarchical organizational structure is functioning.

RESPONSIBILITY: Each person is responsible for his or her own life, experiences and behavior. This extends to taking responsibility for one's participation at a meeting. Facilitators must be sensitive to how much responsibility the participants at any meeting are prepared and able to take.

COOPERATION: The facilitator and participants work together to achieve their collective goals.

HONESTY: Facilitators must model honesty in representing their own values, feelings, concerns and priorities. They should also set the expectation of honesty from all participants.

How to Respond to Challenges

SITUATION:	RESPONSE:
Participant makes comments that appear hostile, argumentative or overly negative.	Acknowledge the points that the participant makes and continue discussion. If no one can persuade or reassure the participant adequately, acknowledge the concern, write it on a flip chart if it seems significant, and continue with the discussion. Be careful not to cause embarrassment to any participants when "reigning them in." The best approach is to talk with persistently disruptive people during a break. If you feel you need to do something during the meeting, do it gently.
Two people persistently engage in a side conversation.	Glance at them or, if that doesn't help, walk toward them (without changing your own behavior) while you continue facilitating the discussion. Once you get their attention they will usually stop talking on their own.
Two or more side conversations erupt.	You can refer the group as a whole to the ground rules or, if no ground rule looks appropriate, you can say, "We need to have just one conversation at a time." If the group does not have a ground rule you can use to reduce side conversations, for example one addressing side conversations or one on the importance of listening, you might suggest that the group add one. If your relationship with the group is a close one, this situation can sometimes be addressed with humor.
A participant brings up the same point repeatedly.	Acknowledge the point the second time ("Yes, I heard you express that .."), paraphrase it the next time ("It sounds like you are saying you're very concerned about..."), and write the point on a flip chart if it's introduced yet again. If the participant still persists, which would be very unlikely, offer to talk with him or her about it at the next break.
A participant makes a comment that does not appear to be on topic, or that introduces a side track you'd rather not have the group pursue.	Acknowledge the point, write it on the flip chart if you are recording other ideas, integrate it if possible, and restate the intended subject of the discussion before you ask for the next comment from the group.
One participant dominates the conversation by speaking too often, thereby depriving others of the chance to talk.	Search out others who want to talk and call on them for a while. If needed, give the too-talkative participant a special job. That will give him or her another way to contribute to the session. For example, you can ask a participant to assist you by recording others' comments on the flip chart.

SITUATION:	RESPONSE:
	<p>Other suggestions for dealing with dominating participants include the following:</p> <ul style="list-style-type: none"> • At the start, set ground rules that allow quieter members to contribute. For example, ask people to contribute only one idea at a time and then wait until three other people have contributed their ideas before speaking again. • Address questions to quieter members of the group. • Engage dominant people in activities that make it clear that you value their contribution, but which keep them quiet. For example, writing notes of discussions on flip charts. • Ask each member of the group in turn for their thoughts and contributions.
<p>Conflict erupts in the group.</p>	<p>Always keep in mind that conflict is inevitable when people work in groups to develop, explore, expand, and make decisions about topics that are truly important to them. It is not only a natural human behavior, but in its positive form (differing, as opposed to arguing) serves a vital role in the capacity-building process. Without the freedom to differ, groups may find themselves limited to only the most conventional, accepted kinds of thinking and problem solving.</p> <p>Conflict is also essential to critical thinking. Groups in which members do not effectively express their differences can fall into "group think," a mode of behavior in which poorly conceived ideas may prevail, because no group member questions them or offers constructive criticism.</p> <p>Three different kinds of conflict can arise during facilitation: conflict based on emotional responses; conflict based on cognitive differences; or, conflict that includes both emotional and cognitive incompatibility. The ideas that follow are designed to help group members understand and work through conflict in a constructive way, regardless of source or type.</p>

SITUATION:	RESPONSE:
	<p>People differ for many reasons, but conflict generally stems from people operating with:</p> <ul style="list-style-type: none">• Different facts• Different experiences• Different values• Different assumptions• Different constraints <p>It is important to understand that conflicts may emerge in an I-STAR session. Regardless of the source of the conflict, strategies can be employed with groups which will resolve them constructively in almost all instances.</p> <p>These strategies include:</p> <ul style="list-style-type: none">• Acknowledge conflicts as they emerge—If differences of a cognitive nature arise within a discussion or while working on a task, recognize them openly at the time they occur, before frustration has a chance to grow and create an emotional situation.• Use ground rules—The first point of return when the group experiences difficulties, whether of an individual or group nature, is to the ground rules. It's a good idea for one of the ground rules to make it acceptable to differ and for another to call for all ideas to be treated with respect. A review of the ground rules may help group members get back into control when emotional behavior arises. If you know in advance that an I-STAR activity is likely to prompt emotional reactions, it is useful to discuss that fact ahead of time, and how to discuss it to avoid emotional conflict before it happens.• Help individuals resolve conflict—If conflict between individuals is affecting the group's ability to do its work, you can try to help the people who are in conflict by gently asking them to work out their differences after the I-STAR session.

SITUATION	RESPONSE:
<p>The organization's executive director wishes to participate in the I-STAR assessment session despite the fact that this practice is discouraged.</p>	<p>Review with the executive director the reasons why his or her participation is discouraged. These reasons include the need for all participants to be as candid as possible; the need to establish non-hierarchical communication; and the need for participants to feel that they are in a very safe environment. Remind the executive director that all findings from the assessment will be shared with him or her. Explain that our experience in working with this methodology shows that participants engage in more self-disclosure when the executive director is not a session participant. If the executive director persists in the request to participate or if the organization has a very small staff (under 10 full-time workers), then, by all means, welcome the executive director into the group.</p>

Exercises that can be used to facilitate discussion about a standard

HEADLINES: Ask participants to read the standards to themselves and explain language or concepts that are unclear. Then divide the group in half. On one side of the room are newspaper reporters. On the other side are interviewees from the organization. The reporter is doing a story on the standards in the organization. Have each pair meet and simulate the interview. After 5-10 minutes, ask the reporters to meet as a group and come up with "headlines." Ask the reporters to share their "headlines." Ask the subjects to identify what they shared and learned. Then, convene the whole group. What patterns, themes and ideas emerged? What did we learn about how well we are doing on these standards?

EXPERT PANEL: The whole group identifies people in the room who know most about this topic. Those people are invited to the front of the room for a panel style interview. The facilitator serves as moderator. The audience asks questions of the experts. The audience members are invited to react to the interview. Finally, the group considers what has been said in light of the standards for this area. Which standards seemed to generate most discussion? Why?

ART EXHIBIT: Divide participants into small groups. Ask participants to review standards and then draw something on a page that represents how the organization is doing in relation to those standards. Have each group come forward to share and interpret its work. What have we learned about our performance on these standards? Which standards attracted the greatest attention from the artists?

DEAR DIARY: Have participants read standards to themselves and then invite them to react by writing personal reflections about them in the form of a diary entry or letter to a close personal friend. The entry or letter should be no longer than a paragraph. Inform participants that their work will not be collected. After 10 minutes, go into whole group discussion. Invite people to share their thoughts and insights. What is the pattern that emerges from this individual reflection?

ORGANIDRAMA: Divide participants into groups. Have participants read the standards in their small groups. Ask each group to prepare a skit that relates to at least three of the standards. Invite each group to perform their skits. Which standards were most widely featured? Why? What insights can we gain from this exercise concerning our performance on the standards?

MINI-SWOT: Assign participants to small groups. Explain briefly the idea of a SWOT analysis (strengths, weaknesses, opportunities, threats). Have participants read the standards in their small groups. Choose the one standard that best represents each of the SWOT letters. Convene the whole group. What can we learn about our organization in relation to these standards?

Energizers that can be used when the group needs to refocus its attention

In general, it is highly recommended that volunteers be recruited to plan and run "energizers sessions." Most people know one or two energizers that they enjoy facilitating. The practice of inviting others to "energize" the group distributes leadership and offers many opportunities for people to share their skills in an enjoyable setting.

Here are some simple energizers that can be introduced if volunteers are not available to handle the energizing task.

All My Neighbors #1—You need an odd number of people for this game that is a distant cousin to musical chairs. Everyone begins by sitting on chairs in a circle with the facilitator standing in the middle. Explain that the person in the middle needs to find some "neighbors." To do so, they'll make a true statement about themselves and hope that it will be true for others. Everyone that "identifies" with the statement has to then stand up and find an empty chair. The person in the center is also looking for a chair, so once again someone will be without a chair, and they get to go to the middle and find some "neighbors."

The facilitator begins with something like: "All my neighbors who speak French." At this, all participants who speak French should jump out of their seats and look for an empty seat. The odd person out goes to the middle.

All My Neighbors #2 (for more "sedate" groups)—The group is in a circle, standing up. The facilitator is standing in the middle of the circle. Explain that you are going to make a variety of statements and you'd like everyone who "identifies" with the statement to join you in the center of the circle for "high fives" or handshakes. The facilitator then begins: "All my neighbors who speak French." At this, everyone who speaks French should join the facilitator in the middle of the circle for a handshake or high five. Participants then return to their seats. The facilitator then goes on through 10 to 15 other such statements. Other statements might be:

- All my neighbors who have an older sibling
- All my neighbors who have children
- All my neighbors who participated in any kind of training event over the last year
- All my neighbors who like chocolate
- All my neighbors who don't eat meat
- All my neighbors who play a musical instrument
- All my neighbors who remember the first time they went to a movie
- All my neighbors who know how to drive
- All my neighbors who have done any gardening in the last month
- All my neighbors who have read a good book in the last two weeks
- All my neighbors who have experienced a birth in the family in the past year
- All my neighbors who like to sing

BLOB TAG

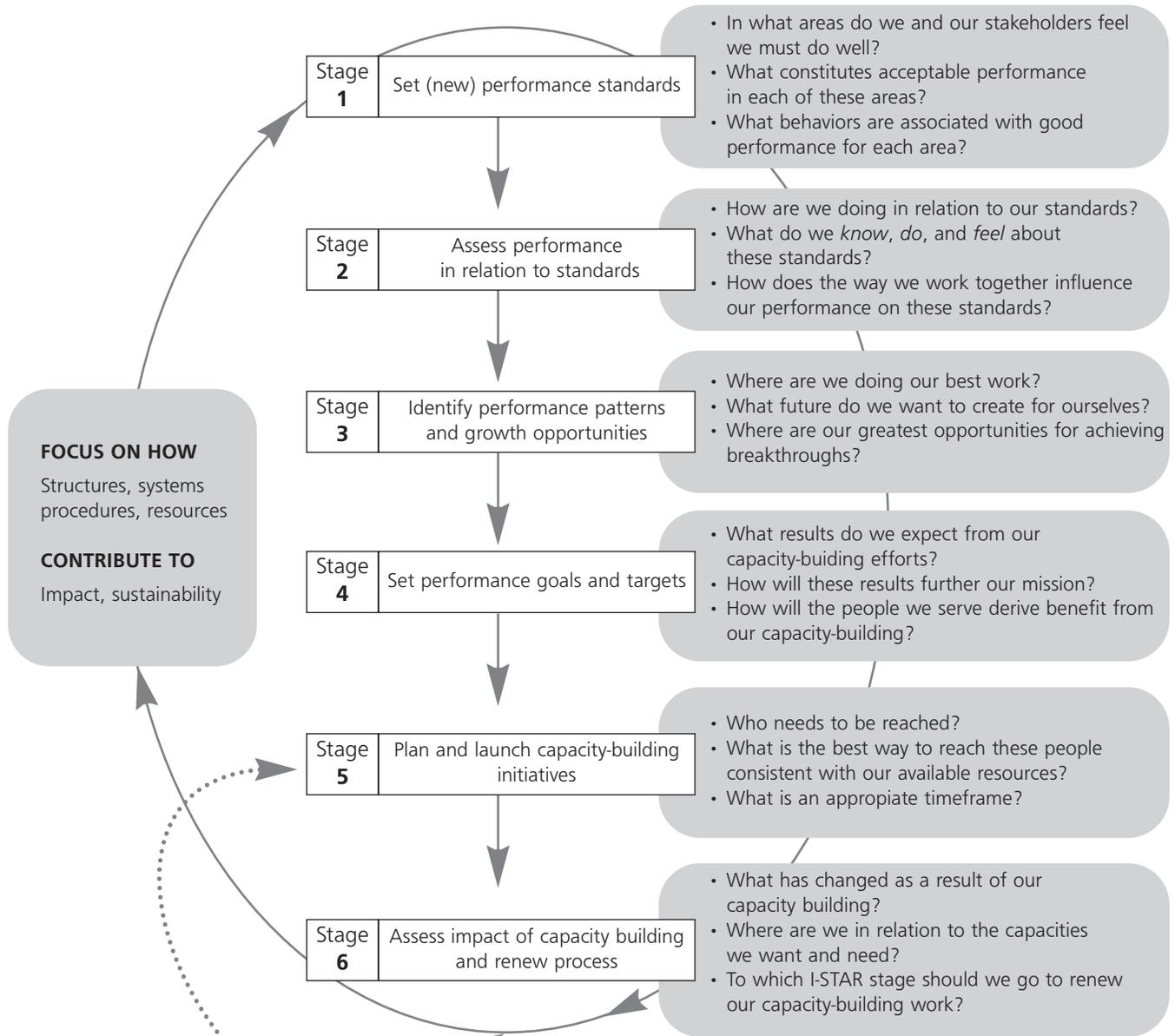
It's helpful to have a pretty large, open space for this energizer. The facilitator is "it". When she or he tags someone they lock arms and then jointly attempt to tag someone else. As each person is tagged they lock arms with those who are already it. The game is over when the last person is "captured." Some boundaries must be set up for this activity to keep folks from roaming too far afield. This game typically takes less than 10 minutes to complete.

SCAVENGER HUNT

Facilitator prepares in advance 2 lists of items that participants can gather from each other, from around the room or in the immediate vicinity. Divide participants into 2 groups, and send them off to find the items. Decide how much time to allow, and stop the action when the time runs out. The group that manages to get the most items on the list in the allotted time wins. Give a "prize" to the winners such as sweets, or have the losers sing a song as the "loser's fee".

Examples of types of items to put on the lists: sunglasses, a flower, a brown shoe, a comb, an item typical of this area, a poem about their organization, a CD or cassette, a blue sock, a photo ID, a foreign coin or bill, a pillow, a blade of grass, toothpaste, a condom, etc.

I-STAR Process Overview



ILLUSTRATIVE CAPACITY-BUILDING ACTIVITIES

- Convening stakeholders
- Networking
- Partnering
- Teambuilding
- Realigning and restructuring
- Fact-finding
- Group problem solving
- Mentoring and pairing
- Modeling and demonstrating
- Piloting and small-scale experimentation
- Consulting
- Planning
- Training
- Materials and manual development or distribution
- Documenting
- Conferencing
- Adapting or adopting validated best practices.

ILLUSTRATIVE NEW ORGANIZATIONAL CAPACITIES

- Determining community needs
- Planning initiatives, projects, and service delivery
- Setting technical specifications for programs
- Maintaining and sustaining quality services
- Assessing the impact of programs on the local environment
- Meeting the needs of bypassed populations
- Developing strategic responses to changes in context
- Mobilizing local and national political support for programs
- Communicating and coordinating with diverse actors and stakeholders
- Partnering with government, other civil society groups and private sector
- Managing financial and human resources
- Mobilizing resources for programs
- Generating fees-for-service



Integrated System for Transformation, Assessment & Results

I-STAR is a comprehensive approach to organizational enhancement that focuses on identifying performance standards, assessing an organization's performance in relation to those standards, and planning and implementing capacity-change activities that result in higher organizational performance. The I-STAR process emphasizes capacity assessment as a springboard for identifying patterns in an organization that hinder or could enhance its ability to achieve its mission. Learning gained through the capacity assessment process helps organizations make the most strategic choices about where to invest scarce time and resources for capacity-building activities.

The methodologies were developed by Project Concern International (PCI) and Education Development Center (EDC), and were tested and refined from 2001-2003 with NGOs and networks partners in six countries. To date, I-STAR has demonstrated its strength in fostering capacity change with over 100 NGOs and networks in 10 countries.

I-STAR was initially developed for use with HIV/AIDS organizations, but has since evolved into two major components: 1) a core component that is appropriate for any organization or network, and 2) programmatic or technical modules tailored to the programmatic priorities of the organization (e.g., reproductive health, child survival, water and sanitation, etc). The methodologies continue to evolve based on field experience, and are adapted to meet the changing needs of partners and projects.

PCI typically uses I-STAR when it forms a partnership with a new organization, or is renewing a continuing partnership. The I-STAR process helps PCI and its partner achieve a common understanding of the needs and opportunities for change within the partner organization, and produces clear plans for how PCI and its partners should prioritize its capacity-building activities.

The I-STAR process includes the following steps:

- 1.** Relationship building and determination of the most appropriate tools for adaptation and application.
- 2.** Conducting organizational capacity self-assessment.
- 3.** Using the assessment data to identify performance patterns and improvement opportunities.
- 4.** Developing plans for priority organizational development activities.
- 5.** Implementing needs-based training and technical assistance activities.
- 6.** Facilitating linkages with available capacity-building resources to address priority needs.
- 7.** Ongoing monitoring of progress and feedback of monitoring information into planning and a renewal of the process.



CAPACITY ASSESSMENT & PLANNING PROCESS

I-STAR capacity assessment and planning activities generally take place over a 2-3 day period, with a “sample” of staff or members of the NGO or network. The sample group should include between 8-15 staff that are as representative as possible of the types of the various departments, functions, and levels of authority within the organization. For a network, the individuals should represent the variety of organizations, positions, and years of experience with the network. This approach helps generate diverse viewpoints and a variety of opinions, in order to create a more accurate “snapshot” of how the organization is doing at that point in time. Project experience suggests that it is preferable to not include the most senior executive (Executive Director, President, Chief Executive Officer, etc) in the process, but it is up to each group to decide on this, depending on how strong a “dominating” force the leader will be in a group dialogue with staff/members from different levels in the hierarchy.

ASSESSMENT

During the first day, a trained facilitator guides participants through a series of group activities designed to elicit experiences and concrete examples of how the organization is doing in relation to a set of performance standards. After each discussion, participants reflect on the insights generated to score the organization’s performance in relation to the standards, using a 1-10 scoring scale. Scoring is done by each individual privately and anonymously on a scoring form. At the end of the session, the facilitators collect the scoring forms and use an Excel spreadsheet program to add up the scores. The Excel program automatically creates a variety of tables and other outputs that are used on the second day to help the participants analyze their organization’s performance.

The performance standards used in this process are based on research and experience, and are continually adapted to the unique needs of the groups the tools will be used with. There are sets of standards for core managerial functions of an organization or network, as well as separate standards related to programmatic areas such as HIV/AIDS, reproductive health, etc. The current methodology covers managerial practices in areas such as:

NETWORK

- Network Learning
- Planning
- Quality Control
- Advocacy
- Generating Resources
- Leadership

NGOs

- Program Design Quality
- Partnering, Advocacy & External Relations
- Financial Management & Administration
- Human Resource Management
- Governance & Strategic Direction-Setting
- Staff Empowerment & Participation
- Resource Mobilization
- Organizational Learning

The capacity areas and the standards are adapted to the specific needs of the program and organization that I-STAR is being used with, to ensure relevance and comprehension.

PLANNING

During the second day, the participants work with the results to identify performance patterns and opportunities for change. The analysis activities are designed to help participants see and understand the factors that contribute to their organization's unique performance patterns, and to make strategic choices about where best to invest their capacity-building efforts. The workshop culminates in producing planning templates for the highest priority capacity areas the organization should focus on in the next 12 months.

These plans are not intended to take the place of existing internal strategic plans or other workplans, but rather are intended to supplement existing plans. However, many organizations find that after the I-STAR capacity-assessment experience, they want to revise their existing strategic or other organizational plans. It is therefore effective to conduct I-STAR prior to or as part of strategic or other major organizational planning processes.

Because the assessment, analysis and planning conducted during the workshop are done with only a sample of the NGO staff or network members, an important follow-up activity is to fully brief senior leaders and other staff/members on the outcomes and

decisions made, to seek their endorsement or further contributions. Another important follow-up is for the organization to decide how to integrate the findings and plans produced through I-STAR into their already existing strategic plans or workplans, and/or to decide if they want to revise their existing plans based on the capacity assessment results.

After the initial assessment, planning and follow-up activities, PCI and its partner establish a written agreement about the priority areas that have been identified for capacity-building, and the roles and responsibilities of both PCI and the partner in implementing capacity-building plans. Once the plan is agreed upon, PCI assists the partner with capacity-building support, which can include technical assistance, mentoring, training, exchange visits, linkages, conference sponsorship, and other activities depending on needs. PCI also assists the partner to establish monitoring and evaluation procedures to assess progress in plan implementation.

As part of the monitoring and evaluation approach, PCI and partners can translate capacity-building objectives into Quality Improvement Verification Checklists (QIVC). Standards prioritized through the assessment and planning process can be restated as QIVCs and then used as part of the organization's ongoing supervisory and monitoring systems. Through the use of such checklists, progress in building organizational capacity can be externally verified through observation, and more quantitative measures of quality improvement can be possible. Progress can then be reviewed on a periodic basis, and capacity-building plans revised as needed based on the results.



After careful review of and experience with a wide range of organizational capacity assessment methodologies, PCI and EDC felt that more was needed to help local partners initiate a planned change process based on accurate information about their organizational needs. Unique characteristics of the I-STAR package that set it apart from other methodologies currently in use include:

BEHAVIORAL STANDARDS: An organization's performance is a direct result of its behaviors the practices an organization engages in that contribute to or hinder success. While many tools incorporate standards, I-STAR uniquely focuses on standards of organizational behavior what an organization does or does not do, and with what consistency and quality.

BEHAVIOR CHANGE

MODEL: Most tools stop at scoring the extent to which an organization lives up to a given performance standard. I-STAR goes further to incorporate factors that support desired organizational behaviors, such as knowledge and skills, motivation, and work context.



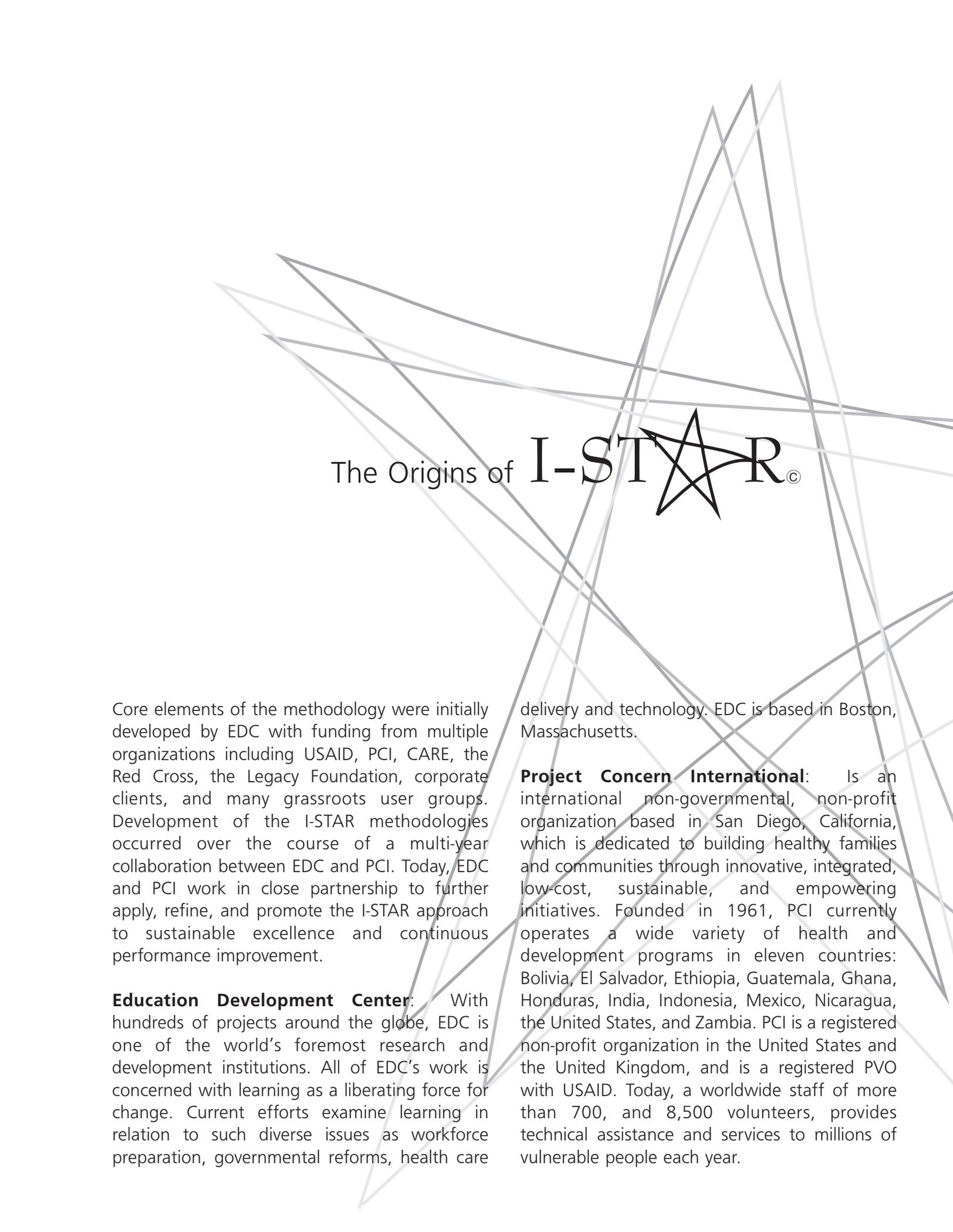
Major Innovations

PLANNING CHANGE BASED ON PATTERNS OF BEHAVIOR:

With limited time and resources for capacity-building, there is no room for guesswork in planning change interventions. I-STAR's behavior change model makes it easier for organizations to identify behaviors most ready for change, and to more precisely pinpoint the types of interventions that can lead to sustained change.

COMBINING FUN AND SCIENCE:

I-STAR mixes the best of dynamic, participatory techniques to engage and energize participants, with a methodologically strong scoring process based on a 10-point scale. Participants report that the capacity assessment and planning process is in itself transformational. Simple Excel templates enable rapid data processing, and produce a rich range of score reports that help organizations see more clearly their behavioral patterns and capacity-building needs and opportunities.



The Origins of I-STAR[®]

Core elements of the methodology were initially developed by EDC with funding from multiple organizations including USAID, PCI, CARE, the Red Cross, the Legacy Foundation, corporate clients, and many grassroots user groups. Development of the I-STAR methodologies occurred over the course of a multi-year collaboration between EDC and PCI. Today, EDC and PCI work in close partnership to further apply, refine, and promote the I-STAR approach to sustainable excellence and continuous performance improvement.

Education Development Center: With hundreds of projects around the globe, EDC is one of the world's foremost research and development institutions. All of EDC's work is concerned with learning as a liberating force for change. Current efforts examine learning in relation to such diverse issues as workforce preparation, governmental reforms, health care

delivery and technology. EDC is based in Boston, Massachusetts.

Project Concern International: Is an international non-governmental, non-profit organization based in San Diego, California, which is dedicated to building healthy families and communities through innovative, integrated, low-cost, sustainable, and empowering initiatives. Founded in 1961, PCI currently operates a wide variety of health and development programs in eleven countries: Bolivia, El Salvador, Ethiopia, Guatemala, Ghana, Honduras, India, Indonesia, Mexico, Nicaragua, the United States, and Zambia. PCI is a registered non-profit organization in the United States and the United Kingdom, and is a registered PVO with USAID. Today, a worldwide staff of more than 700, and 8,500 volunteers, provides technical assistance and services to millions of vulnerable people each year.