



CHECKLIST #7:

Conducting an Abridged Capacity Building Assessment

If you do not have the time to complete the full study outlined in this toolkit, you can conduct an abridged capacity building assessment in three meetings.

MEETING 1:

Step 1: Discuss assessment purpose and definitions

- 1: Facilitate discussion around Section 1
Facilitate a discussion around the questions in section 1 of this toolkit, specifically the **purpose of the assessment and the definition of capacity building**.

Step 2: Give homework for reflection

- 2: Describe homework
Homework: A) ask staff to **review any existing evaluations of their capacity building activities** and, B) depending which will yield the most honest results in your organization, EITHER:

- Hold a brief **focus group with other staff** in their departments to collect any feedback they have received during or after their capacity building activities. Provide a brief list of questions for staff to ask during the focus group. OR
- Distribute a **brief anonymous survey** to collect feedback from other staff. Provide the survey via paper or online.

C) Whether during the focus group or in the survey, include **questions about the estimated percent of time staff spend on capacity building** and other questions of interest (e.g., whether most time was spent providing individual or group support, about certain topics, etc.). Based on Meeting 1, be specific about the definition of capacity building and the time frame of interest.

MEETING 2:

Step 3: Review meeting 1

- 3: Review meeting 1
Remind all participants about the **learning objectives determined** during Meeting 1.

Step 4: Discuss parts A and B of the homework

- 4: Share positive and negative feedback identified from homework
Ask each participant to share **one piece of positive feedback and one piece of negative feedback** based on the evaluation forms (focus groups or surveys) received. Chart these on large butcher paper or whiteboards.

Step 5: Discuss themes of parts A and B of the homework

- 5:** Themes and action items
Discuss common **themes and any follow up or action items** you may want to pursue.

Step 6: Collect part C of the homework

- 6:** Collect staff time information to report at next meeting
Collect responses to time questions **and analyze** before meeting 3.

MEETING 3:

Step 7: Review meeting 1 and 2

- 7:** Review meeting 1 and 2
Remind all participants about the **learning objectives determined** during Meeting 1 and the **process conducted to date**.

Step 8: Discuss time analysis

- 8a:** Share and discuss staff time analysis
Discuss the staff **time analysis results** based on the information shared as part C of the homework.
- 8b:** Add any new themes or action items
Share the themes and action plan from Meeting 2 and **add anything that comes from the time analysis discussion**.

Step 9: Summarize and finalize

- 9:** Create final action plan
Summarize learnings and, if appropriate, **create a final action plan** with specific action items assigned to specific people by certain deadlines. Be sure to include a way to follow-up on the plan and monitor progress toward goals.