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FINAL CONSULTANCY REPORT

Developed for

WEPIA

FUNDED BY



By

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eⁿAble Development Solutions

**The Academy for Educational Development
Cooperative Agreement No. 278-A-00-00-00201-00**

- *Assessment of Partner NGO's*
- *Preparation for Fundraising Workshop & Development of Training Materials*

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I. SCOPE

WEPIA's contract requested the assessment of the fundraising capacity of the six partner NGO's. In addition, the contract requested development of support materials that can be used in a fundraising workshop, originally scheduled to take place during the third week of September. In addition, WEPIA requested recommendations to be submitted regarding follow-up action to be taken by the project in terms of its capacity-building program of the six NGO's.

Due to the prevalent world political situation in September, the fundraising workshop has been rescheduled to a later date. The time originally scheduled for collaboration with Consultant Joan Mason in delivering the workshop has been utilized as follows:

- Develop an expanded review of the organizational and fundraising capacity of the six partner NGO's. This is reflected in the report being more detailed and containing detailed text as opposed to simple scoring (please see assessment of each NGO below – Sections III-VIII).
- Review WEPIA media campaign for future participation in planning campaign
- Editing *A Day in the Life* English CD

II. METHODOLOGY

The detailed methodology of assessment is included in the section below. The task was conducted with support from Ms. Hala Dahlan of WEPIA. Ms. Dahlan provided invaluable support in participating in five of the six meetings, ensuring all relevant arrangements for the interviews and ensuing follow-up.

A meeting was held with at least the executive director of each partner NGO. The tool discussed below has been followed to ensure an objective assessment of each organization.

It is important to note, however, that in certain cases the assessment is incomplete and the scores, therefore, may be revised. Whenever this is the case, notes to this regard have been included under each criteria. A case in point is the BPWA. For example, BPWA membership criterion may not reflect the true state of the organization due to their promise to deliver to us communication materials. As these materials have not been delivered, they cannot be scored. Thus, either a reassessment should take place when such materials are in fact produced in the future, or an adjustment can be made if in fact these materials do exist and only are awaiting delivery.

As for the fundraising training manual development, nine different handouts have been prepared. These handouts and reading materials are designed to provide readers with an in-depth view of specific fundraising topics. The practical nature of the materials emphasize the intention of the handouts in providing readers with hands-on information, tactics and tips they can implement within their organizations.

Following is a list of the topics prepared:

1. *Elements of a Healthy Fundraising Program*
2. *Role of the Board in Fundraising*
3. *The fine art of Asking*
4. *Ten Mistakes You Can Avoid*
5. *Ten Ways Board Members Can Help Raise Money without Asking For It*
6. *Donor Rating for Small Organizations*
7. *Programs & Activities of Membership-Based Organizations*
8. *Special Events*
9. *Board Commitment – The Statement of Agreement*

III. ORGANIZATIONAL ASSESSMENT STRATEGY AND METHODOLOGY

Associations have been diagnosed based on their ability to raise funds to achieve their primary missions and realize their objectives. The overriding consideration employed in designing this tool has been a focus on long-term self-sustainability with the view that associations need to progressively and methodically rely less on international donors and develop internal funding mechanisms.

This diagnostic tool uses criteria necessary for organizational success. Each criterion assesses an association in a specific area, and the collective results of an association's standing yields a descriptive assessment of their status in terms of ability to achieve financial sustainability.

Criteria Utilized in Assessment

- Criterion One: Vision, mission, and objectives*
- Criterion Two: Communications & Public Relations*
- Criterion Three: Finances*
- Criterion Four: Governance*
- Criterion Five: Employees*
- Criterion Six: Membership recruitment and maintenance (if applicable)*
- Criterion Seven: Fundraising Strategies & Plans*

Rationale

The assessment is designed to be an objective review of an association in a variety of areas that collectively contribute to the success of the organization and its ability to reach financial sustainability. Assigning numerical scores to the criteria under consideration is designed to identify areas requiring substantial capacity building as unveiled by the lowest score.

Criteria Indicators

To determine if an association meets the standards, certain organizational FACTORS for each criterion will be measured. The FACTORS are based on (1) documentation of fundamental functions; (2) answers to key structural and operational questions; and (3) descriptions of major activities. Each FACTOR has been given a numerical value of 10 to 20 points. The scoring of the FACTOR will be based on achieving certain criteria.

Criterion Major Findings

Based on discussion with interviewee, every section illustrates research findings. This serves as the basis for scores derived as well as the development of the "Recommendations" section, which can be found at the end of this report.

The Criterion "Membership"

While all six WEPIA partner organizations do have members, it is questionable whether they truly can be considered authentic member-based organizations. With the exceptions of the Business and Professional Women Association, the other five organization's membership orientation is elusive.

Therefore, to determine the applicability of this test criteria to each organization, review of its mission statement is essential. Such will be used as the yardstick to determine the proper role of *Criterion Six: Membership* in the analysis.

If an organization is deemed not a member-based organization, this does not necessarily negate the important role of membership development in organizational success and in contributing to overall financial stability and sustainability. The implication will mean that membership can serve as another fundraising tool for non-membership-based organizations, as opposed to being the essence for its reason to exist.

Determining Membership-based organizations

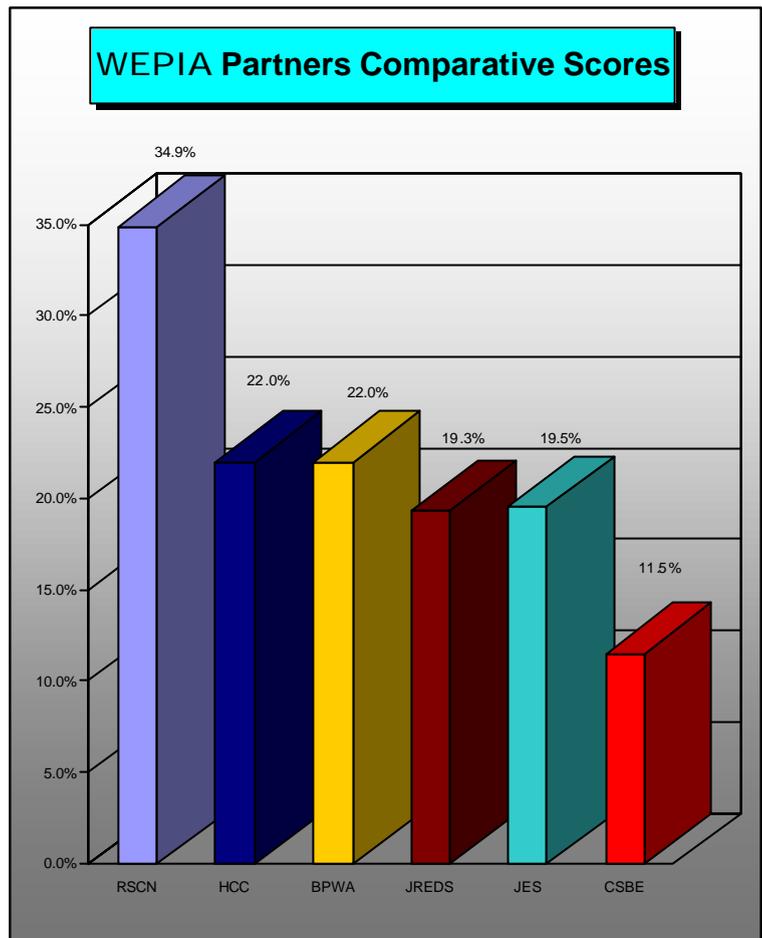
Whether an organization will be scored as a membership-based organization will depend on the following test:

Membership-based organization = An organization created and operates for the purpose of representing and promoting the interests of its members.

Ratings

The criteria ratings are based on a SCALE OF 1 TO 10 (1 = non-existent or lowest rating and 10 = excellent or highest rating). Certain factors have been scored based on a scale of 15 or 20 points. These factors have been given heavier weight based on their relative importance to the specific objective of assessing the organization under question in terms of its fundraising capacity. Such weights are indicated as footnotes.

Judgments for ratings on this scale will be based on these values: qualities, quantities, results, stakeholder acceptance, refinements, completeness, and/or value to the overall mission of the organization.



Comparative Ratio Score

The final comparative ratio is an indication of the strength of an association compared to the ideal complete score. The assessment points will be added, then divided by 740—the total number of possible points—to arrive at a percentage score. Membership-based organizations' score is divided by 890 possible points to arrive at the final score.

Total Possible Scores

Non-Membership-based Organizations

Maximum Possible score = 740 points	Organization Score = x points
	= x%

Membership-based Organizations

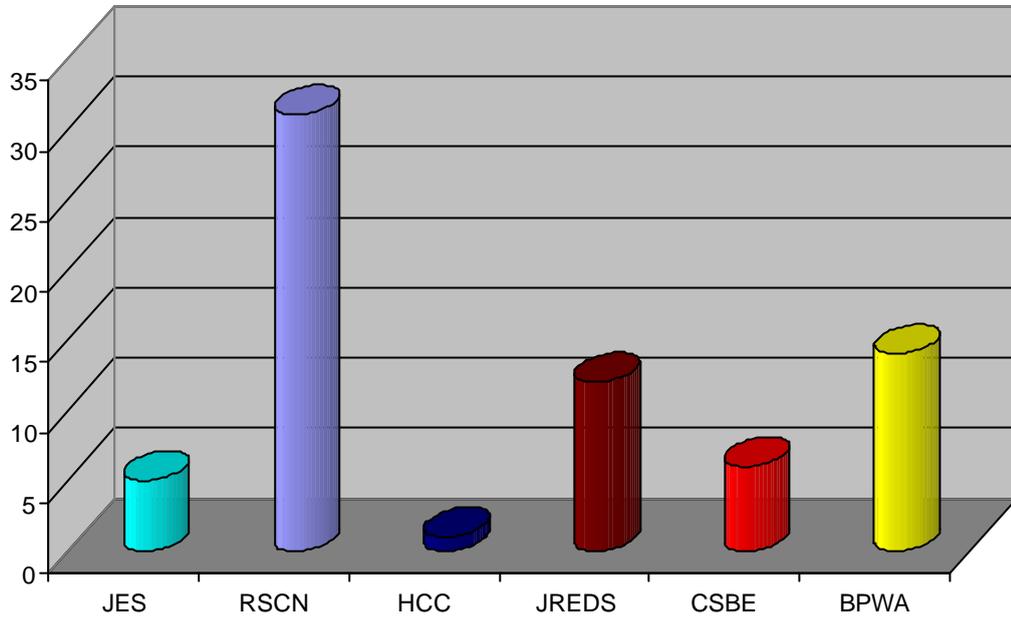
Maximum Possible score 890 points	Organization Score = x points
	= x%

Weighted Scores per Criterion

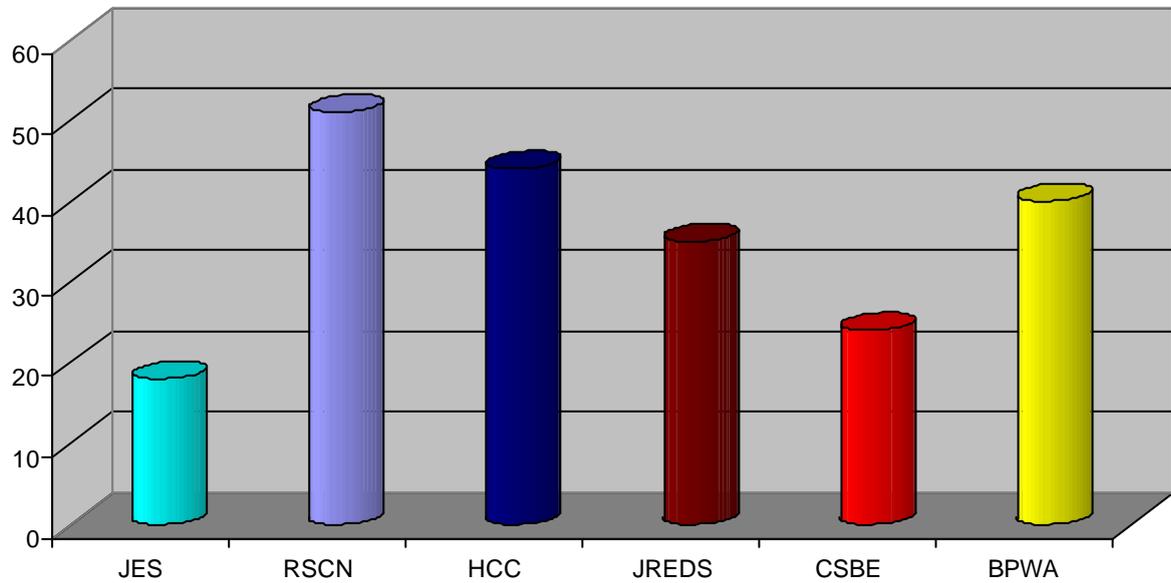
CRITERION ONE: VISION, MISSION, AND OBJECTIVES	50 points
CRITERION Two: Communications & Public Relations	110 points
CRITERION Three: Finances	110 points
CRITERION Four: Governance	120 points
CRITERION Five: Employees	100 points
CRITERION Six: Membership	150 points
CRITERION Seven: Fundraising Strategies & Plans	250 points

The Following charts indicate the comparative results of WEPIA partner NGOs by criterion.

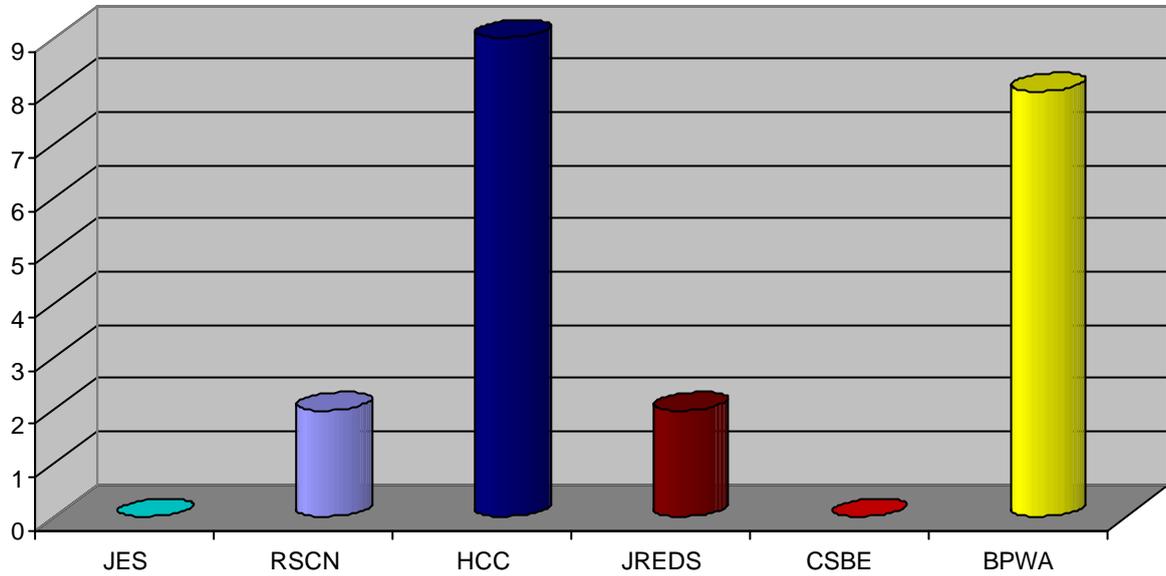
Vision, Mission & Strategies



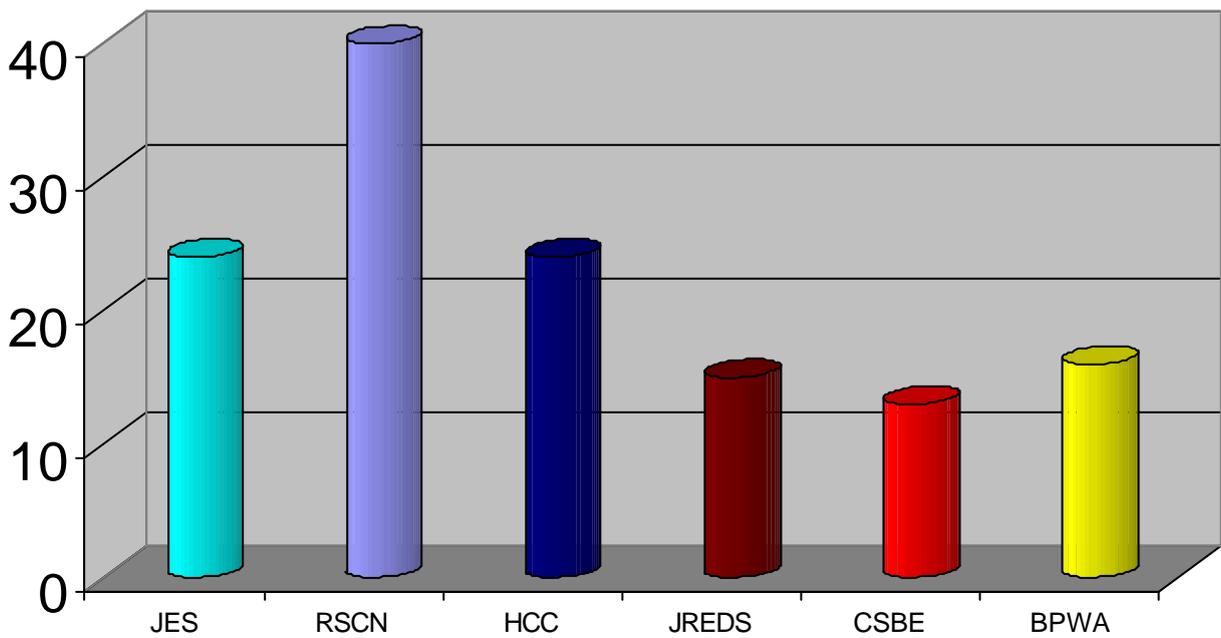
Communication & Public Relations



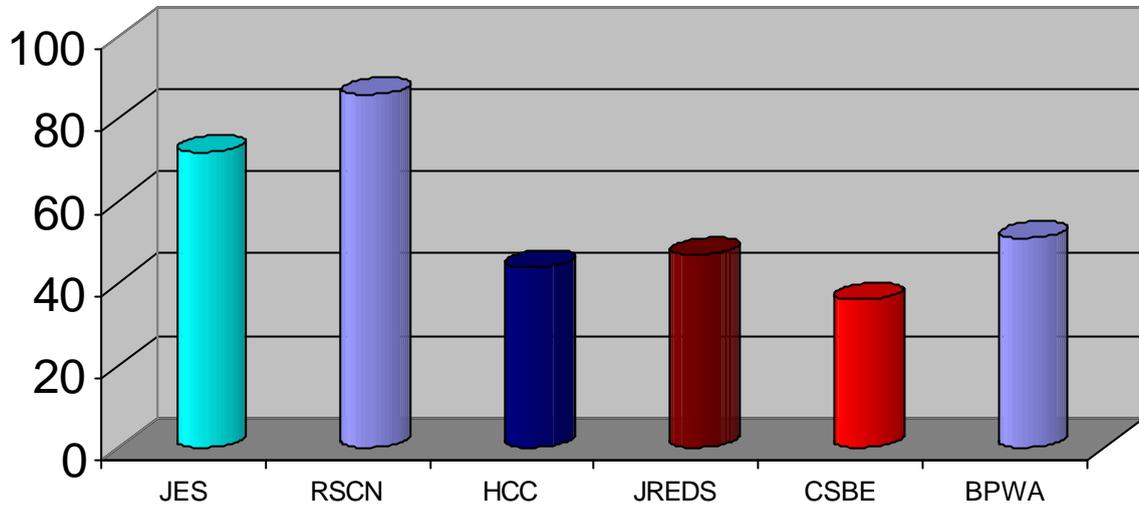
Governance



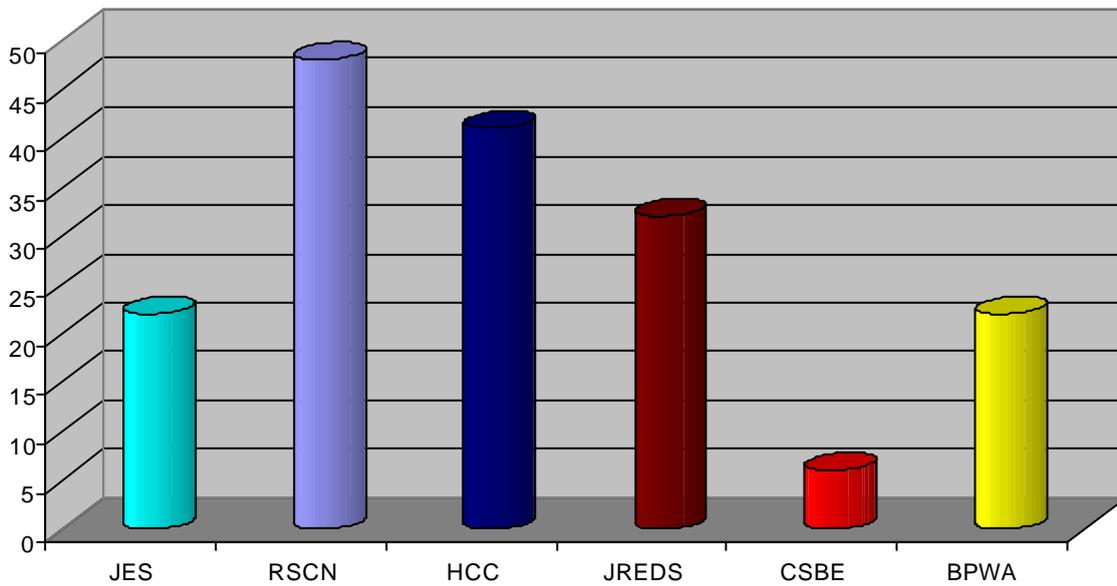
EMPLOYEES



FINANCE



FUNDRAISING



Important Note: Understanding the Assessment

First: The Criteria

It is crucial to emphasize that each organizational assessment has been conducted to measure the fundraising capacity of WEPIA partner NGOs. While many of the criteria utilized do not correspond to the action of soliciting a contribution (such as presence of a mission statement or action plan), they do, however, relate to the organization's ability to undertake an active program of work that would make it viable to build credibility and receive and manage funds.

Second: The Individualistic Nature of the Assessment

Perhaps even more important to the above note is emphasizing the fact that each assessment is individualistic. This means that the assessment measures each criteria according to the specific needs and nature of the organization under consideration. Thus, the size, scope and nature of each organization has been factored in the determination of each factor score.

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For example, if two organizations have been found to have provided the exact same answer to the Finance criterion, one organization might receive a score of 50 while the other might receive a score of 70. To illustrate, the sophistication of financial systems or public relations apparatus necessary to be in place for the JD2-million-per-year RSCN would definitely need to surpass by far those required to be in place for CSBE. Thus, the overriding consideration has been the needs for each specific organization to reach the level of sustainability that it needs according to its nature and scope.

V. RECOMMENDATIONS

Following the comprehensive assessment of each of the six associations, it has emerged as a clear result that most associations (with the exception of RSCN, and to a lesser extent HCC) are operating on a truly commercial nature. This means that these associations project a charitable nature with disregard to long-term financial sustainability.

Obviously, as the assessment indicates, each organization has specific and varying needs. Review of the various criteria would indicate specific findings of each. However, there are also many cross-cutting themes that all organizations need capacity building in.

Therefore, depending on WEPIA goals, capacity and available budget, all or some of the following interventions can be pursued to effectively build the capacity of the six NGO's to achieve their missions and to attain long-term sustainability.

Phase I – Organizational Management Training

WEPIA partner NGOs can go through a comprehensive one-week training covering a broad overview of association management principles and aspects. This training should focus on the following areas:

1. Role of association in society
2. Development of vision and mission
3. Development of strategic plans
4. Development of action plans
5. Association marketing
6. Association public relations
7. Role of the Board of Directors¹
8. Role of professional staff²
9. Board / Staff relations
10. Development of membership campaigns
11. Non-dues sources of income
12. Association financial management
13. Overview of fundraising

Phase II – Fundraising Training

Following Phase I, WEPIA partner NGOs can go through a focused and intensive fundraising training. Fundraising for the 21st Century (planned earlier) would be an excellent tool to achieve this.

Phase III – Advanced Training

Issue-specific workshops can then be held focusing on areas of priority. These include one of the above issues already covered as an overview, but will be delivered in-depth. A one or two-day workshop on each issue can be held. An example is an intensive consideration of membership development, etc.

¹ Can run concurrently, but separately with Board/Staff Relations. (Board and staff attend separate sessions).

² See above note.

Phase IV – U.S. Study Tour

A study tour in the U.S. may be held following or concurrent with Phase III. This should only be held for select number of individuals that exhibit a distinct disposition to acquire and practice knowledge presented during the above training. Twinning with a US partner for partial scholarships should be considered.

Phase V – Organizational Infrastructure Development

This relates to supporting the development of management infrastructure of partner organizations such as procurement of computer systems, updated software, databases, etc.

Phase VI – On-going Technical Assistance

WEPIA may also consider on-going or periodic technical assistance for partner NGOs in the areas of strategic and work planning, public relations, fundraising and membership development.

Customized Capacity Building - *Sharing of findings*

A customized capacity building program that takes into account the specific needs of the organization should be developed. The program would include the six phases discussed above, as well as a customized track for each specific NGO emanating from the needs identified through the assessment.

In order for partner NGOs to begin addressing weaknesses identified, a report should be provided to each organization, along with the findings and the score. Suggested capacity building initiatives should be spelled out with self-administered efforts highlighted. In order to be most effective, the report should be written in a manner that emphasizes positive reinforcement and builds upon the strengths of the organization.

Reassessment

Periodic reassessment of all six NGOs should be conducted once every six months. The reassessment should measure how each organization is progressing and will unveil chronic areas that may necessitate more focused and specialized assistance. Ideally, over a three-year period, NGOs should reach a level of between 80% and 90%

While the above applies to all organizations, specific recommendations have been included throughout the assessment for each partner NGO of WEPIA. The findings of the assessment indicate major areas of support needed based on the resulting score of each criteria. This, combined with the six-phase capacity building program, should ensure that WEPIA partner NGOs reach a world class status of association management capacity. They should also reach long-term financial sustainability.