

Capacity Assessment Activity

For programs, campaigns, and teams

One of the key limiting factors for your work is your team's collective capacity to carry things out. This tool is designed to provide definitions and a way to quickly assess collective capacity at the programmatic and team level. Different staff members may have varying perceptions around their individual capacity. This tool can help you articulate those perceptions and identify the shared strengths and needs that limit or define your work.

This tool intends to provoke discussion and help groups develop a sufficient, shared view of what you're positioned to collectively manage well. It is not meant to indicate the health of your organization, assess individual performance, or determine strategy effectiveness. You can use this discussion to support planning efforts like refining program and campaign strategies, supporting individual workplans, creating professional development targets, or informing group benchmarks, timelines, and goals.

This tool is best used as a group discussion activity focused on one program, campaign, or team effort and requires approximately 90 minutes. Plan to spend about 60-80 minutes filling out the grid together, and about 10 minutes confirming action items. As a capacity assessment, keep your focus on internal factors and what you have direct access and control over. Capacity is defined for this purpose through four categories:

- **People and Money: *what you directly invest***
 - Staff and the percent of their time or focus. Try to be specific and list staff and put a general % of what their focus on this work is.
 - The funds you can specifically direct at this work.
- **Knowledge and Skills: *the unique specialties you hold***
 - The special contributions your people bring with them that are inseparable from their time or effort
 - Technical expertise and skills, insight, prior experience
- **Influence: *the leverage and attention you can muster***
 - Key Relationships: the **access** you have with key individuals & the **influence** you have over their decisions and actions
 - Footprint: the number of supporters you can connect to this issue and their level of engagement
 - Communications: your ability to broadcast relevant information to audiences clearly and quickly
- **Assets: *the things you can easily share that don't require time or effort***
 - These are **material things** not strengths or leadership traits
 - Meeting space, vehicles, tools, gear, access to databases

Discuss each of these categories then score each of them **RED**, **YELLOW**, or **GREEN** to indicate the general capacity of that category that your team can contribute to this work.

RED = poorly resourced, and capacity is low or nonexistent

YELLOW = capacity is sufficient or functional, though potentially stressed

GREEN = capacity is high and team resources are abundant

NAME OF PROGRAM / CAMPAIGN / ACTIVITY:

Capacity	RED/YELLOW/ GREEN	Strengths	Needs
PEOPLE & MONEY <i>What we directly invest</i>			
KNOWLEDGE & SKILLS <i>What our people uniquely bring with them</i>			
INFLUENCE <i>The attention and support we can muster</i>			
ASSETS <i>The material things we can easily share</i>			

ACTION / PLANNING

- *How does this capacity assessment impact your strategy or goals for the next year (or near future)? Are there any adjustments you need to make?*
- *Can any of your capacity needs be met through professional development opportunities? What might those be?*
- *Does this capacity assessment illuminate some bigger needs, challenges, or indicate other discussions that need to be had? With whom? When can you have them?*