

Introduction: Organizational Assessment (OA) and Discovery Sessions (DS) Consultant Manual

An Organizational Assessment is a comprehensive consultant-led process that nonprofits can use as a framework to build organizational resilience. Resilience enables nonprofits to fulfill mission, meet strategic goals, identify assets, leverage strengths and adapt to internal and environmental change. Discovery Sessions offer a brief, focused process that addresses one or two specific issues that a nonprofit wishes to explore; these sessions, facilitated by a consultant, are also meant to support resilience.

This guide (consultant manual) was developed as our sector is re-considering the term “capacity building”. While the term may be perceived as value neutral, what capacity means has often been determined by white-dominant assumptions about effectiveness. Unquestionably, there are organizational elements that seem essential to effectiveness, chief among them enough funding to advance mission. Even all-volunteer organizations typically need some money to serve their community.

But other aspects of traditional capacity assessment may miss the mark. For example, as consultants do we account for organizational culture and context when attempting to determine what capacity a nonprofit should aim for? Our purpose in offering these insights is to encourage consultants to think about what capacity might mean to an organization itself aligned with its values and culture, rather than as an objective standard against which all organizations should be measured.

The OA questions provided in the consultant manual function as prompts for consultants. The consultant manual, and all the materials within, is meant to help consultants facilitate meaningful discussions that produce collective thinking, reflections, insights, and prioritized actions about organizational issues and opportunities.

Consultants are encouraged to “right size” these processes by selecting questions and resources designed for the circumstances, aspirations and needs of the organization.

Assumptions

OA and DS consultants:

- Will have expertise in organizational development in the nonprofit sector
- Use appreciative inquiry as a facilitative approach
- Facilitate dialogue to surface issues related to structural racism and economic and social mobility
- Help organizations explore internal dynamics that may affect capacity, effectiveness and performance
- Encourage participants to own these processes, generate solutions, and be responsible for results
- Assume that the wisdom needed for organizational resilience is “in the room”
- Promote the benefits of actively engaging with NSP and the nonprofit sector in the region
- With the organization, consider potential community partnerships of which they may not be aware

Resources in the consultant manual

- Introduction (this document)
- OA concept map
- Description of the steps in the OA/DS processes
- DS assumptions, purposes, points of entry, how to use DS
- OA assumptions, purposes, points of entry, how to use OA
- OA/DS prescreening interview formats
- OA/DS participant grids (table to list participants for first session)
- OA/DS agendas for meetings one and two
- Organizational Assessment Question Guide
- Guidelines for using Three Wishes (an Appreciative Inquiry tool)
- Three Wishes handout
- OA/DS final report templates

Reference Resources Available [HERE](#)

- Reframing Capacity Building
- Race & Equity
- Organizational Life Cycle
- Appreciative Inquiry