**WAGGGS**

**Capacity Assessment Tool (CAT)**

**Section 2**



Welcome to WAGGGS Capacity Assessment Tool, Section 2.

This is a self-assessment tool designed to enable Membership Organisations to take an overview of their strengths and to identify any areas that may need improvement or could be further developed. It will also enable us at WAGGGS to better support you in your work. Please make sure you refer to the **Guidelines, Glossary, Frequently Asked Questions (FAQs)** and ask your CAT Mentor or Relationship Manager for any additional support you may need. All underlined words can be found in the Glossary.

**Introduction**

Now that we have looked into the **Girl Experience** and the **Adult Leadership** **Practice,** our **Core Mission Elements (What We Do),** and how we go about providing them, it is time to take a larger view on the organization. We will now look at **Organisational Identity (Who We Are)**, **Organisational Structure & Strategy (How We Grow)**, and more of the **Functional** side of things **(How We Do It)**. Please refer to the wheel below to see how we group the Organisational Elements. We thank you for taking the time to bring together the right people in the organization to answer these questions clearly and thoroughly. We hope you enjoy the process and find it productive. We look forward to the results you share, as they will help us shape the tailored support we seek to provide.

****

**Contents – Section 2**

**I. ORGANISATIONAL IDENTITY (Who We Are) 5**

[**I.1 Mission and Vision 5**](#MissionVision3)

1. Mission and Vision

[**I.2 Values 6**](#Values5)

1. Values

**II. ORGANISATIONAL STRUCTURE & STRATEGY (How We Grow) 7**

**[II.1 Strategy & Planning 7](#Strategy6)**

1. Strategy
2. Planning
3. Performance Management

[**II.2 Governance 11**](#Governance10)

1. Structure and Systems
2. People and Effective Teamwork

**III. FUNCTIONAL ELEMENTS (How We Do It) 16**

[**III.1 Organisational Management 16**](#OrganisationalManagement15)

1. Operational Structure, Systems & Processes
2. Staff Structure, Systems & Processes

[**III.2 Finance 19**](#Finance21)

1. Planning and Budgeting
2. Basic Accounting Systems
3. Financial Reporting
4. Internal Controls
5. Grant Management
6. Staffing / Volunteering Issues Affecting Finance

[**III.3 Resource Mobilisation 26**](#ResourceMobilisation25)

1. Fundraising

[**III.4 Image & Visibility 27**](#ImageVisibility)

1. External Visibility
2. Consistent Identity
3. Membership Communication

[**III.5 Influence 31**](#Influence)

1. Influencing National Policy
2. Ability

[**III.6 Recruitment & Retention 35**](#RecruitmentRetention34)

1. Data Management
2. Member Recruitment
3. Member Retention

**I. ORGANISATIONAL IDENTITY (Who We Are)**

**I.1 Mission and Vision**

A **mission statement** defines what drives an organisation and its reason for being.

The **vision statement** provides strategic direction and describes what the organisation wants to achieve in the future.

|  |
| --- |
| **MISSION & VISION: Standard 1: Mission & Vision** |
| The association has a clear mission statement, and vision statement where appropriate, in place, which reflects what drives the organisation. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** |  **Please provide information to support your choice...** |
| Indicator No. | **A**  |  **B** | **C** |  **D** |
| **1. Mission & Vision** | There is a mission and/or vision in place, which describes what the organisation is trying to achieve or become. This is mostly unknown by the organisation’s members, staff and volunteers. | There is a mission and/or vision in place, which describes what the organisation is trying to achieve or become. Not all members, staff and volunteers are familiar with the mission and the vision. | The vision and/or mission are a clear, specific statement of what the organisation is trying to achieve or become. This is well-known and understood by most members, staff, and other volunteers. | The vision and/or mission are a clear, specific statement of what the organisation is trying to achieve or become. This is well-known and understood by all members, staff, and other volunteers. The mission and/or vision is consistently used to direct actions and set priorities. |  |
| **2. Mission & Fundamental Principles of Guiding** | The association’s mission does not reflect the Fundamental Principles of Guiding within WAGGGS. | The mission reflects the Fundamental Principles of Guiding within WAGGGS. | The mission reflects the Fundamental Principles of Guiding within WAGGGS. This is partly applied across the association’s activities and implementation of its organisational strategy. | The mission fully reflects the Fundamental Principles of Guiding within WAGGGS. This is actively pursued at all level of the association’s activities and implementation of its organisational strategy. |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Indicator No. | **A**  |  **B** | **C** |  **D** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **3. Mission Alignment with WAGGGS Mission & Vision** | The mission (and vision where appropriate) of the association is not aligned with the WAGGGS mission and vision. | The mission of the association is aligned with the WAGGGS vision, however there is no plan for progress or measurement of progress. | The mission of the association is aligned with the WAGGGS vision. Progress towards achieving this vision is measured ad-hoc, with no clear methodology in place. | The mission of the association is aligned with the WAGGGS vision. Progress towards achieving this vision is measured on a regular basis, using an agreed methodology. |  |

**I.2 Values**

The values guide the perspective of the organisation, as well as its actions. They provide frameworks for the way we do things. They relate to how organisations deal with their beliefs about people and work. They define how the organisation expects its members to behave.

|  |
| --- |
| MISSION & VISION: Standard 1: Values |
| All associations have defined values which align with the Fundamental Principles of WAGGGS.  |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| Indicator No. | **A**  |  **B** | **C**  |  **D** |  |
| **1. Values** | There is a clear set of values in place, but they are not widely known by members, staff, and volunteers. | There is a clear set of values in place, which are widely known by members, staff, and volunteers; however, there is no consistent application of them. | There is a clear set of values in place, which are widely known and understood by members, staff, and volunteers. These values are consistently used to direct actions and set priorities. | There is a clear set of values in place, which are known and understood by all members, staff, and volunteers. These values are consistently used to direct actions and set priorities. The association assesses on a regular basis how its activities reflect its values. |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Indicator No. | **A**  |  **B** | **C**  |  **D** |  |
| **2. Values Reflecting the Fundamental Principles of Guiding** | The set of values does not fully reflect the Fundamental Principles of Guiding, volunteering and inclusivity within WAGGGS and our non-formal educational method. | The set of values fully reflects the Fundamental Principles of Guiding, volunteering and inclusivity within WAGGGS and our non-formal educational method. | The set of values fully reflects the Fundamental Principles of Guiding, volunteering and inclusivity within WAGGGS and our non-formal educational method. They are consistently used to direct actions and set priorities.  | The set of values fully reflects the Fundamental Principles of Guiding, volunteering and inclusivity within WAGGGS and our non-formal educational methods. They are consistently used to direct actions and set priorities. The association assesses on a regular basis how its activities reflect the fundamental principles of guiding, volunteering and inclusivity within WAGGGS. |  |

**II. ORGANISATIONAL STRUCTURE & STRATEGY (How We Grow)**

**II.1 Strategy & Planning**

A strategy sets out how an organisation will go about achieving its vision and mission. It will generally identify the key thematic areas of work and high level objectives for the organisation. An organisational strategy covers more than one year, usually three to five years.

Planning in this context relates to the more detailed – often annual – process of identifying the work required and likely costs of delivering that work.

At all levels, the measurement of performance is critical. Regular monitoring and reviews of what is and is not working means that action can be taken to ensure that an organisation can respond appropriately to changes both internally and externally.

|  |
| --- |
|  STRATEGY & PLANNING - Standard 1: Strategy  |
| The association has a clear strategy that sets out how it will work over several years towards achieving the vision and mission. |
|
|

|  |  |
| --- | --- |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| Indicator No. | **A**  |  **B** | **C**  |  **D** |  |
| 1. **Strategy**
 | No strategy document is available. | There is a basic 1-2-year plan that relates to achieving the mission and vision, and describes what the association wants to achieve in the medium term, based on the organisational values (see I.2 above). The strategy is widely accepted as valid by the membership. | There is a long-term Strategy in place with a clear set of objectives that are simply articulated and provide a broad description of how progress towards the vision and mission may be achieved over several years.The strategy is aligned with the organisational values (see I.2 above).The strategy is widely accepted as valid by the membership. | There is a long-term strategy in place with a clear set of objectives that are simply articulated and provide a broad description of how progress towards the vision and mission may be achieved over several years.The strategy is aligned with the organisational values (see I.2 above) and it is used to help key decision making. The strategy is regularly reviewed and adjusted based on changes in the internal and external environment.The strategy is widely accepted as valid by the membership. |  |
|  STRATEGY & PLANNING - Standard 2: Planning |
| Using the strategy, associations develop annual plans that describe what work needs to be done and money spent to work towards achieving strategic objectives.  |
|
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| Indicator No. | **A**  |  **B** | **C**  |  **D** |
| 1. **Annual Plan & Budget**
 | No annual plans or budgets are in place. | The association has a list of activities for the year that will help achieve the strategy. The plan also shows who will be involved in doing the work, and some indication of how much it is likely to cost. | The plan includes a realistic budget and has clear links to the strategic objectives.The development of the plan or list of activities involves getting input from relevant national, sub-national and local leaders and other members.  | The plan includes a realistic budget and has clear links to the strategic objectives.The development of the plan or list of activities involves getting input from relevant national, sub-national and local leaders and other members. The annual plan is reviewed regularly and updated to reflect changes in priority and need within the association.  |  |
| **2. Awareness of External Environment** | There is limited awareness of the external environment and how it can impact the organisation. | In the planning process, the association considers external environment factors, but this is done in an ad-hoc manner, with no clear method being applied. | In the planning process, the association uses appropriate resources, tools and methods to analyse external environment factors and their impact on the organisation. | In the planning process, the association uses appropriate resources, tools and methods to analyse external environment factors and their impact on the organisation.The plan is regularly reviewed and adjusted based on changes in the external environment.  |  |
|  STRATEGY & PLANNING - Standard 3: Measuring performance |
| Associations use a defined process for measuring how well they are delivering the annual plans and strategic objectives, and reporting these results to internal and external stakeholders.  |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.**. | Please provide information to support your choice. |
| Indicator No. | **A**  |  **B** | **C** |  **D** |
| **1. Performance Measurement and Review** | There are no mechanisms in place for the association to review its performance.  | A review of progress against proposed activities and overall performance is carried out at least **once** per year to check if everything is on track.No systematic organisational capacity assessment tools are used. | A review of progress against proposed activities and overall performance is carried out at least **twice** per year to check if everything is on track.The performance measurement process also takes into account the views of members and others directly involved or affected and shows transparently what those views are.An organisational capacity assessment tool is used once per year as part of the process of reviewing how well the organisation is able to deliver its strategy.There is some limited evidence that plans are adapted based on performance. | A review of progress against proposed activities and overall performance is carried out at least **four** times per year to check if everything is on track.The performance measurement process also takes into account the views of members and others directly involved or affected and show transparently what those views are.The organisational capacity assessment tool is used once per year as part of the process of reviewing how well the organisation is able to deliver its strategy.There is a clear process for adapting annual and strategic plans based on the measurement of performance.  |  |
| Indicator No. | **A** | **B** | **C** | **D** |  |
| **2. Reporting System** | No systematic organisation-wide reporting mechanism is in place. | A basic reporting system is in place, allowing a summary of activities to be recorded. This information is not widely available.  | Performance reports are produced at least annually. These reports are not widely available, either internally or externally. | Systematic reporting on organisation wide performance is completed four times a year. This includes both successes and challenges. The report is made available to all interested parties. An annual report including an overall summary of achievements as well as lessons learned is produced and shared.  |  |

**II.2 Governance**

Governance refers to the way in which the Member Organisation is governed at the highest level. A constitution and bye-laws set out the governance structure and framework for managing the Member Organisation. The constitution outlines the systems and processes for holding the association accountable to its members.

|  |
| --- |
| GOVERNANCE - Standard 1: Structure & Systems |
| The structure and systems in place to support the smooth running of the organisation and the implementation of the constitution and bye-laws are fit for purpose. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1.Policies and Procedures that Support Constitution** | No policies or procedures that support the implementation of the constitution are in place. | Few of the association’s policies and procedures that support the implementation of the constitution are in place and followed. | Most of the association’s policies and procedures that support the implementation of the constitution are in place and followed. | All of the association’s policies and procedures that support the implementation of the constitution are in place and followed. |  |
| **2. Performance Evaluation System** | No performance evaluation system is in place for the senior leadership, including board members and, where the association has employed staff, the CEO or equivalent. | Informal performance evaluation system takes place annually.People are not made fully aware of how and when such evaluation will take place.  | A formal annual performance evaluation system is in place for the senior leadership.People are fully aware of the details and procedure around the evaluation.  | An effective formal annual performance evaluation system is in place for the senior leadership and contributes to the continued development of both Board Members and senior staff (if applicable). Objectives, performance and development opportunities are reviewed and discussed regularly throughout the year. People are fully aware of the details and procedure around the evaluation. It is regularly reviewed for potential improvement. |  |
| **3. Recruitment Process** | No process exists for recruiting new board members and the CEO. | A process exists for recruiting new board members and the CEO, but the terms are not clearly defined. | An agreed process exists for recruiting new board members and the CEO, using generic selection criteria.  | An open and transparent process is used to recruit new board members and the CEO against clearly identified skills-based selection criteria. |  |
| **4. Induction Process** | No induction process in place for new board members and the CEO. | An induction process is in place for board members and the CEO, but it is not up to date or might not be consistently applied. | An induction process in place for new board members and the CEO, clearly stating the person responsible for the induction.The induction policies and process are consistently applied and mostly up to date. | A clear induction process is in place for new board members and the CEO, in place for each position, clearly stating the person responsible for the induction of the new board member. The induction policies and process are consistently applied, reviewed and updated regularly.  |  |
| GOVERNANCE - Standard 2: People & Effective Teamwork |
| The association uses appropriate tools and techniques to maximise the effectiveness of the senior leadership.  |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Skills and Experience of Board** | Not aware of the need to take into account the skills and experience required in the composition of the board to address organisational needs effectively. | The Board is aware that it needs to take into account the skills and experience required in the composition of the Board to address organisational needs effectively. It has a plan to improve its practice. | The Board considers and understands the skills and experience required in the composition of the Board in order to address organisational needs effectively. | The Board considers and understands the skills and experience required in the composition of the board in order to address organisational needs effectively. The recruitment processes for board members are tailored to fill the identified skills gaps. |  |
| **Indicator No.** | **A** | **B** | **C** | **D** |  |
| **2. Board & CEO Development** | Lack of awareness of the need for board/CEO development. | The Board is aware of the need for senior leadership development and has a plan in place to introduce this.There is no formal board/CEO development system in place. | Formal development opportunities are made available to board members and the CEO. | Board members and the CEO actively identify their development needs. Opportunities are provided to address identified skills and experience gaps.  |  |
| **3. Awareness of Board Roles and Responsibilities** | Lack of awareness of the need for understanding board roles and responsibilities. There is no signed and documented agreement. | Not all board members formally accept and understand their role and related responsibilities. There is no signed and documented agreement.  | Each board member formally accepts and understands their role and related responsibilities. There is no signed and documented agreement.  | Each board member formally accepts, understands and delivers their role and related responsibilities. This agreement is signed and documented.  |  |
| **4. Effective Ways of Working Together** | Lack of awareness of the need to build effective ways of working together. | No clear system in place to manage and improve effective working relationships. | Effective working relationship methods are applied, but inconsistently, which does not maximize the potential of effective working relationships.  | All board members actively pursue and apply methods to build effective working relationships to fulfill the board's responsibilities.  |  |

**III. FUNCTIONAL ELEMENTS (How We Do It)**

**III.1 Organisational Management**

Organisational management refers to the ability of a Member Organisation to ensure the effective and efficient use of all available resources in order to implement all its key organisational and programmatic functions.

|  |  |
| --- | --- |
| ORGANISATIONAL MANAGEMENT: Standard 1: Operational Structure, Systems & Processes |  |
| The association has an effective operational structure, systems and processes in place that are implemented consistently and reviewed on a regular basis. |
|
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |
| **1. Operational Policies and Procedures** | No documented operational policies and procedures in place  | The organisation has documented some operational policies and procedures. Some policies and procedures are incomplete. | The organisation has all documented operational policies and procedures necessary to comply with the national legal requirements in place | The organisation has all documented operational policies and procedures completely comply with national requirements. These are fit for purpose. The policies and procedures are regularly reviewed and revised taking new regulations, standards, technology, and structural changes into account. Changes are communicated to all affected by the policy or procedure and new versions accessible to all.  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **2. Decision-Making Process** | Decisions are mainly made on an ad-hoc basis, usually by one person. | Appropriate decision makers are appointed. The decision-making process is well-known but is followed inconsistently, often becoming informal. | There is a formal decision-making process in place, with appropriate decision-makers being appointed. The decision-making process is well-known and generally followed. | There is a clear, formal decision-making process in place, with appropriate decision-makers being appointed.The decision-making process is based on broad participation, allows for consultation and dissemination. Where employed by an association, staff members feel a sense of accountability and ownership of decision-making. |  |
| **3. Technological Infrastructure** | Technological infrastructure does not exist or is not fit for purpose.  | Technological infrastructure meets the basic needs of the association. | Fully adequate technological infrastructure for the current organisational needs.  | Technological infrastructure well-tailored to organisation’s current and anticipated future needs (correlated with the overall organisational strategy and planning). Networked computing hardware with up-to-date software applications used regularly by volunteers and – where employed by an association, staff members. |  |
| **4. Physical Infrastructure** | Non-existent or not fit for purpose physical infrastructure. | The existing physical infrastructure meets the basic needs of the association. | Fully adequate physical infrastructure for the current organisational needs.  | Physical infrastructure well-tailored to organisation’s current and anticipated future needs (correlated with the overall organisational strategy and planning).  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **5. Management Review** | No system in place to support change management. | The effectiveness of existing management systems is reviewed in an ad-hoc manner, with no clear process being followed.There are significant delays and problems in response to internal and external change.  | There is a clear, established process in place for reviewing existing management systems.There are few delays or major problems in response to internal and external change. | There is a clear, established process in place for reviewing existing management systems.There is an overall sense of agility and ease in response to internal and external change.The overall reviewing of existing management systems feeds back into the organisational strategy and planning. |  |
| **6. Project Management Policies and Procedures** | No project change management policies and procedures in place. | The organisation has minimum project change management policies and procedures in place, but they are not fully fit for purpose in order to support effectiveness and the smooth run of the projects.Project management tools and methods are applied inconsistently.  | The organisation has project change management policies and procedures, which are fit for purpose and support effectiveness and the smooth run of the projects.Project management tools and methods are applied consistently. | The organisation has project change management policies and procedures, which are fit for purpose and support effectiveness and the smooth run of the projects.Project management tools and methods are applied consistently and reviewed and updated periodically.Lessons learned from project implementation are used for adjusting project management tools and methods to be used in the future.  |  |
| ORGANISATIONAL MANAGEMENT: Standard 3: Staff structure, systems & processes ( This standard is only applicable to organisations that have employed staff.) |
| The association has fit for purpose staff structure, systems and processes in place that are implemented consistently and reviewed on a regular basis.  |

|  |  |
| --- | --- |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** |  |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Staff Policies and Procedures** | Staff policies and procedures (e.g. job description, contracts, health & safety, work schedule, payment, etc.) do not comply with minimum national legal standards. | General staff policies and procedures comply with minimum national legal standards.The association uses general job descriptions (JD) and employment contracts, which are not adapted to individual staff roles. | Appropriate, tailored-made staff policies and procedures comply with national legal standards.The association uses specific job descriptions (JD) and employment contracts, which are adapted to individual staff roles. | Appropriate, tailored-made staff policies and procedures comply with national legal standards.The association uses specific job descriptions (JD) and employment contracts, which are adapted to individual staff roles.Human Resources (HR) policies and procedures are reviewed and updated regularly. |  |
| **2. Staff Recruitment** | No formal process exists for recruiting new staff.The selection of new staff members is done in an ad-hoc manner, without any needs analysis or pre-determined screening measures. | A process exists for recruiting new staff, but the terms are not clearly defined.There is an informal organisational needs analysis regarding staff, but this is not fully considered in the staff selection process. | An agreed process exists for recruiting new staff, using generic selection criteria (e.g. general recruitment messages). Staff selection is based on actual requirements and pre-determined general screening measures. | An open and transparent process is used to recruit new staff against clearly identified skills-based selection criteria.Recruitment messages are realistic and clear about the roles, responsibilities, assignments and expectations. Recruitment messages indicate what screening procedures are followed in the organisation.The recruitment process is updated and tailored for every new vacant position. |  |
| **3. Staff Induction Policies** | No induction process and policies in place for staff. | General induction process and policies in place, but not up to date or might not be consistently applied. | Specific induction policies and processes in place for each position, clearly stating the person responsible for the induction of the new staff member. The induction policies and process are consistently applied. | Specific induction policies and processes in place for each position, clearly stating the person responsible for the induction of the new staff member. The induction policies and process are consistently applied, reviewed and updated regularly.  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **4. Handover Policies and Processes** | No handover policies or process in place. | General handover policies and process in place, which might not be consistently applied. | Specific handover policies and processes in place for each position, clearly stating the responsibilities of the staff members involved in the handover process.The handover policies and process are consistently applied. | Specific handover policies and processes in place for each position, clearly stating the responsibilities of the staff members involved in the handover process.The handover policies and process are consistently applied, reviewed and updated regularly. |  |
| **5.** **Staff Training and Development** | Lack of awareness of the need for training and development of staff. | Informal staff training and development opportunities are provided, without a clear structure or plan. | Formal staff training and development opportunities are made available, but this is not necessarily designed based on the needs analysis. | Staff members actively identify their development needs. Training and development opportunities are provided to address identified skills and experience gaps. There is a clear link between the staff training and development plan and the overall organisational strategy and planning.  |  |
| **6. Job Performance Evaluation** | No performance evaluation system is in place. | Informal performance evaluation system used. Feedback is provided and collected in an ad-hoc manner. | An agreed-upon formal performance evaluation system is in place and consistently implemented. | An effective, annual formal performance evaluation system is in place, consistently implemented and contributes to the continued development of staff members.The performance evaluation system is regularly reviewed and updated. Clear and planned system in place to award and reward staff. |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **7. Staff Retention Strategy** | No staff retention strategy in place. | Staff retention strategy in place but inconsistently implemented.  | Staff retention strategy in place, linked with the overall organisational strategy, and consistently implemented. The organisation makes appropriate changes to try and increase retention. | Staff retention strategy in place, linked with the overall organisational strategy, and consistently implemented. In developing the retention strategy, the organisation uses needs research.The retention strategy is reviewed and updated on a regular basis. |  |
| **8. Diversity & Inclusion in Staff Recruitment** | The association does not address diversity and inclusion issues, or intentionally or otherwise excludes groups from Staff. | The Staff partially reflects the diversity of the society in which the organisation operates, in an arbitrary manner. Diversity and inclusion are not necessarily considered in the staff recruitment process. | The staff recruitment and selection processes reflect the diversity of the society in which the organisation operates.Diversity and inclusion is a priority in the recruitment and selection processes. | The staff recruitment and selection processes fully reflect the diversity of the society in which the organisation operates.Diversity and inclusion strategy is a priority in the recruitment and selection processes, with clear goals and targets being set.The diversity and inclusion strategy is regularly reviewed and updated. |  |

**III.2 Finance**

The association has fit for purpose financial reporting, systems and processes in place that are implemented consistently and reviewed on a regular basis.

|  |
| --- |
| FINANCE: Standard 1: Planning and budgeting |
| Budgeting is about working out how much your planned activities are likely to cost. Budgets have a crucial role to play in strong financial management. A fit for purpose, basic planning and budgeting process would have all the following in place:1. Budgets are prepared in good time for all the costs of running the association
2. Both finance and programme staff / volunteers are involved in setting budgets
3. Project budgets are based on the costs of planned activities
4. Budget worksheets include explanatory notes and clear calculations
5. A separate budget is prepared for core costs (overheads)
6. The association budgets are approved by their board of trustees / directors
7. A named individual (budget holder) is responsible for implementing and managing each budget
8. Budget codes match (or correspond to) accounting codes
9. All planned operational costs are adequately funded
10. A cash flow forecast is prepared every month
 |
| Indicators | Please provide information to support your choice |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 4 of the above are in place | 4-5 of the above are in place | 6-7 of the above are in place | At least 8 of the above are in place |  |
|  |
| FINANCE : Standard 2: Basic accounting systems |
| Accounting systems don’t need to be in the form of a dedicated, purpose built accounting system. However, having robust accounting systems and processes in place will help provide comfort that finances are being managed well. A fit for purpose, basic accounting system would have the following in place:1. Every payment made has a supporting document providing evidence
2. All cash and cheques received are recorded on pre-numbered carbon copy (if you don’t receive cash or cheques, you comply with this)
3. All payments and receipts are recorded in either a physical or computer-based cashbook (date, description, amount)
4. There is a separate cashbook for each bank and cash account
5. Every entry in the cashbooks is cross referenced to a supporting document
6. All cashbooks are updated at least once a month
7. All cashbooks are written neatly in permanent ink (not pencil) or on a computer
8. A standard (determined by the association) chart of accounts is used to code (or classify) each transaction in the cashbooks
9. Transactions are also classified by project and/or donor using an association determined standard list of “cost centres” and / or “project codes”
10. A bank reconciliation is done each month, for every bank account
11. A cash count reconciliation is witnessed and recorded each month
12. The association keeps track of amounts owed to others and owed by others
 |
| Indicators | Please provide information to support your choice. |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 4 of the above are in place | 4-6 of the above are in place | 7-8 of the above are in place | At least 9 of the above are in place |  |
|  |
| FINANCE - Standard 3: Financial Reporting |
| The board of trustees / directors need financial reports to oversee the finances of the association. Managers need up-to-date figures to monitor projects and make decisions. Donor agencies need reports to check the use of their money, and often as a condition for further funding. Increasingly, associations are sharing financial information with beneficiaries to increase accountability and build confidence. An annual external audit verifies the accuracy of the financial statements. A fit for purpose basic financial reporting system would have the following in place:1. The board of trustees / directors reviews financial reports every quarter
2. Senior managers discuss financial reports at least once every three months
3. Reports include details of cash and bank balances, amounts due to the association and owed by the association
4. Budget holders receive budget monitoring reports every month
5. Budget monitoring reports include explanations and comments about differences
6. Financial reports are used to help make decisions
7. Financial information is shared with beneficiaries at least once each year, in an accessible way
8. Annual audits are up to date (signed within six months of the year end)

*Note: Donor reports are considered in Standard 5: Grant management* |
| Indicators | Please provide information to support your choice. |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 3 of the above are in place | 3-4 of the above are in place | 5-6 of the above are in place | At least 7 of the above are in place |  |
| FINANCE : Standard 4: Internal Controls |
| Associations use a lot of different internal controls to make sure that: * Assets are safeguarded
* Accounting records are accurate and up to date
* Fraud and errors are prevented and detected
* Staff/volunteers are protected

A fit for purpose basic system of internal control would have the following in place:1. Cash is kept safely in a locked cash box or safe, in the custody of one individual
2. All cash received is banked intact, i.e. without being spent (if no cash is received you fully comply with this requirement)
3. All cheques are signed by at least two authorized signatories (if you do not use cheques, you fully comply with this requirement)
4. Cheques are signed only when all the details have been properly filled in, i.e. no signatories ever sign blank cheques (if you do not use cheques, you fully comply with this requirement)
5. Bank reconciliations are checked by someone who did not prepare them
6. There is a written policy detailing who can authorize expenditure of different types or value
7. All transactions are properly authorized
8. Cash payments are authorized by someone other than the cashier
9. Different steps in the procurement process (e.g. ordering, receiving and paying) are shared among different people
10. Expense claims for staff advances are checked by the same person who authorized the advance
11. Staff salaries (including advances and loan deductions) are checked each month by a senior manager
12. Statutory deductions (e.g. payroll taxes) are properly made and on time
13. All fixed assets (e.g. vehicles, computers, equipment) owned by the association are insured and controlled using a fixed asset register
14. There is an approved policies and procedures manual in place which is relevant to the association and known by staff / volunteers
15. A properly registered audit firm is selected by the trustees

Note: Other standards also include important controls. For example, cash and bank reconciliations are important for checking accuracy of accounting records and identifying fraud. |
| Indicators | Please provide information to support your choice. |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 5 of the above are in place | 5-7 of the above are in place | 8-11 of the above are in place | At least 12 of the above are in place |  |
|  |
| FINANCE : Standard 5 - Grant Management |
| Most associations get at least some of their funding as grants from donor partners. A fit for purpose basic grant management system would have the following in place:1. There is a signed grant agreement in place for each grant
2. Senior leadership check grant conditions are reasonable before signing agreements
3. Grant conditions are known in full by relevant finance staff/volunteers, budget holders and delivery teams from the start
4. There is compliance with the terms and conditions in grant agreements
5. Donors receive financial and narrative reports in the right format and on time
6. Donor financial and narrative reports are consistent and clearly linked to each other
7. Restricted funds are only spent in line with the conditions of the grant and never “borrowed” for other activities
 |

|  |  |
| --- | --- |
| Indicators | Please provide information to support your choice. |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 3 of the above are in place | 3-4 of the above are in place | 5-6 of the above are in place | All of the above are in place |  |
| FINANCE: Standard 6: Staffing / Volunteering Issues Affecting Finance |
| Good financial management is dependent on staff / volunteers with the right skills, support, and attitude to carry out their responsibilities. All staff / volunteers have a role to play in financial management. The accounting staff / volunteers are part of a wider team including the executive director, programme managers and the board of trustees / directors. Integrating good financial management into programmes involves budget holders and finance staff / volunteers working hand in hand through all the stages of the financial cycle (plan-do-review).It may be difficult to assess the technical competence of accounting staff/volunteers. Good indicators are the timeliness of reports, the neatness of files and records in the accounts office, and auditor’s comments or recommendations.A fit for purpose financial management system would have the following in place:1. The board of trustees / directors includes someone with the skills needed to oversee all financial activities
2. The finance staff/volunteers have the skills (and qualifications) needed to carry out all financial activities
3. Managers and programme staff/volunteers have the financial skills they need to manage budgets and implement controls
4. Finance staff/volunteers and budget holders work together well in payments processing and budget monitoring
5. Different roles within the finance function are clearly defined, known and followed
6. Senior staff/volunteers lead by example in following control procedures
7. Finance staff/volunteers are recruited freely and fairly on the basis of merit only
8. Relevant staff/volunteers receive the training and support they need to carry out their financial management responsibilities
 |
| Indicators | Please provide information to support your choice. |
| **A**  |  **B** | **C** |  **D** |
| Fewer than 3 of the above are in place | 3-4 of the above are in place | 5-6 of the above are in place | At least 7 of the above are in place |  |

**III. 3. Resource Mobilisation**

Resource Mobilisation refers to the process by which an organisation secures financial and non-financial resources for purposes of sustainably implementing its mission and fulfilling its purpose of existence.

|  |
| --- |
| RESOURCE MOBILISATION: Standard 1: Fundraising  |
| The association is able to secure sufficient voluntary funding to deliver strategy in line with mission, vision and values and has diverse sources of funding. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Fundraising Plan** | No fundraising plan in place and no fundraising is being delivered. | Informal discussions on fundraising. Opportunistic fundraising is being done, but no plan in place. | Basic fundraising plan, which outlines fundraising needs and actions.  | Detailed fundraising plan, which outlines fundraising needs and actions; (1) Understanding of fundraising landscape and strands; (2) priorities for Girl Guides and Girl Scouts. The plan is implemented and reviewed regularly.  |  |
| **2. Infrastructure and Resources** | No infrastructure or resources within the organisation to support fundraising. | Sufficient infrastructure and resources to deliver fundraising based on: (1) opportunities; (2) without a plan. | Sufficient infrastructure and resources to proactively seek funding from various sources. Actions are connected with the overall fundraising plan. There is a dedicated Staff/ Volunteer/ Team that oversees and supports the association’s fundraising effort. | Advanced infrastructure and resources that include: (1) Database/ customer relationship management system; (2) Case for support;(3) Donor care and stewardship; (4) Dedicated staff/volunteer/Team; (5) Policy/ governance framework; (6) Value alignment/ ethical screening; (7) Approval system and due diligence(8) Dedicated fundraising committee or equivalent |  |
| **3. Income Generation** | Limited knowledge of the funding sources of the organisation. | Income generated only from a single source and less than 15% of all organisational income raised through fundraising. | Income generated from more than one source: (1) No single source of income contributes more than 50% to the total. (2) More than 15% of all organisational income raised through fundraising. | Income is generated from diverse sources: (1) No single source of income contributes more than 30% to the total (2) More than 30% of all organisational income raised through fundraising and grants. |  |
| **Indicator No.** | **A** | **B** | **C** | **D** |  |
| **4. Fundraising Partnerships** | No partnership to support fundraising.  | Short-term (no more than a year), one-off or low-value fundraising partnerships. | Multi-year or repeat fundraising partnerships are in place.  | Multiple long-term, high-value fundraising partnerships with organisations with similar values (strategically well-aligned with the mission and vision of the association). Existing partners are willing to recommend the association to other possible partners.The association is able to sustain complex partnerships with financial and non-financial benefits. |  |

**III.4 Image & Visibility**

Image and visibility refers to the identity and messages that are portrayed by the association when communicating with its internal and external audiences. Image is built through a common visual identity and messaging which showcases the work and purpose of the association. Visibility refers to the work carried out by the association to engage external audiences so that those outside of the Movement are aware of the association and understand its work and purpose.

|  |
| --- |
| IMAGE & VISIBILITY: Standard 1: External Visibility  |
| The association has communication mechanisms in place to increase external visibility amongst its target audiences. |
|
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** |  | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Media Strategy** | The association does not have a media strategy in place and does not work to actively engage the media.  | The association carries out some media / public relations (PR) work, but this is not linked to broader strategy, priority projects or programmes. | The association has a media strategy in place. They have some contacts with local media and achieve some press coverage relating to broader strategy, priority projects or programmes. | The association has a media strategy in place, which is reviewed regularly. They proactively build and maintain targeted media relationships and achieve regular press coverage relating to broader strategy, priority projects or programmes.  |  |
| **Indicator No.** | **A** | **B** | **C** | **D** |  |
| **2. Crisis Communications Plan** | There is no crisis communications plan in place. | Crisis communications are ad-hoc or inconsistent. | There is a reactive protocol to be followed, in case of crisis. | A comprehensive crisis communications plan is in place, including identified spokespeople and the protocols to be followed. The plan is reviewed regularly.  |  |
| **3. Social Media Strategy** | The association is not using social media channels.  | Social media channels are not being used regularly or consistently. | Association is actively using digital and social media channels but content is not always up-to-date or effectively targeted to its audiences. Limited or no monitoring or analysis of media / social media channels takes place. | Digital and social media channels are updated regularly with content that is engaging and targeted to association’s audiences. The effectiveness of media/social media channels is monitored and analysed. |  |
| **4. Voices of Girls and Young Women** | The voices of girls and young women are not being shared with external audiences through any channels. | The voices of girls and young women are not often apparent in association’s external communications. | The voices of girls and young women are prioritised in external communications and visible across all channels. The message is about girls and young women, but girls and young women are not necessarily involved in creating the message. | The voices of girls and young women are prioritised in external communications and visible across all channels. Girls and young women actively participate in shaping the external communications.  |  |
| IMAGE & VISIBILITY : Standard 2: Consistent identity |
| The association presents a unified image and message across all of its channels and when communicating with all of its internal and external audiences. |
| For each indicator, please choose the level (A”, “B”, “C” or “D”) which best describes the current situation in your organisation. | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Consistent Identity** | There is no clear brand or consistent identity in place in the association. Logos, colours, messaging, photography etc. is used in an inconsistent manner. Design work does not present a unified or professional image. | A brand / visual identity is in place, but this is not always used consistently through all areas of the association. Design work presents a professional image but is not targeted for specific audiences. | Association has a clearly defined brand with brand guidelines in place. The brand / visual identity is applied in a consistent manner across all areas of the association. Design work presents a professional image but is not targeted for specific audiences. | The association has a clearly defined brand with brand guidelines in place. The brand / visual identity is applied in a consistent manner across all areas of the association. Design work, photography and written communications are effective at showing internal and external audiences a unified and professional image.  |  |
| **2. Communication Training** | No training in place to support the development of communication skills within the association. | Communications training is limited – resulting in inconsistent use / understanding of a common brand / identity. | Communications training is available for all relevant parties within the organisation, ensuring access and ability to use the common brand / identity. | Communications training is available for all relevant parties within the organisation, ensuring access and ability to use the common brand / identity. The training is designed according to identified needs. |  |
|  |
| IMAGE & VISIBILITY : Standard 3: Membership Communications |
| The association has mechanisms in place to communicate effectively with its adult and youth members. There is a relationship in place between the association and WAGGGS for sharing mutually useful or generated content. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** |  |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** | Please provide information to support your choice. |
| **1. Strategies, mechanisms and channels** | Association does not have mechanisms in place to communicate messages, priorities and projects to adult members. | The association uses informal and ad-hoc mechanisms and channels in place to communicate with its adult members. | The association has strategies, mechanisms and channels in place to communicate key priorities, projects and messages to all adult members. The message is not consistently tailored for the adult members. | The association has effective strategies, mechanisms and channels in place to communicate its key priorities, projects and messages to all adult members in a regular and timely manner. They measure and review the outcomes. In building the communication strategies, mechanisms and channels, the association consults on a regular basis with the adult members. |  |
| **2. Youth Communication Strategy** | The association does not have mechanisms in place to communicate messages, priorities and projects to its young members (aged 18 and under). | The association uses informal and ad-hoc mechanisms and channels in place to communicate with its young members (aged 18 and under). | The association has some mechanisms and channels in place to communicate with young members (aged 18 and under). The message is not consistently tailored for specific age groups. | The association has effective strategies, mechanisms and channels in place to communicate key priorities, projects and messages to all young members (aged 18 and under) and/or with parents where relevant in a regular, age-appropriate and timely manner.They measure and review the outcomes. In building the communication strategies, mechanisms and channels, the association consults on a regular basis with the youth members. |  |
| **Indicator No.** | **A** | **B** | **C** | **D** | **P**lease provide information to support your choice. |
| **3. Extended Communications Strategy** | WAGGGS communications are not shared with wider adult or youth members. | WAGGGS communications are shared informally or ad-hoc. | Only major WAGGGS projects are shared with the broader adult and youth members in the association. | Relevant projects from WAGGGS are shared with the broader adult and youth members. These are used as an opportunity to support the association’s own communication strategy.  |  |
| **4. WAGGGS Communication Strategy** | No content is shared with WAGGGS.  | Content is shared with WAGGGS, but is not necessarily planned, or does not have a clear purpose.  | The association actively and regularly shares content with WAGGGS, and asks for support for further dissemination and visibility. | The association actively and regularly shares content with WAGGGS, and asks for support for further dissemination and visibility. The association also shares content that supports communication priorities set by WAGGGS.  |  |

**III.5. Influence**

Influencing decision makers / people at the community, local, national and global levels to make decisions that improve the lives of girls and young women.

|  |
| --- |
| INFLUENCE: Standard 1: Influencing National Policy  |
| The association’s influence contributes to changes at the national level in areas directly related to their work in line with their vision, mission and priorities. |

|  |  |
| --- | --- |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Strong relationship with decision makers** | The association has no established connections with decision-makers (government officials, policy makers, community leaders, etc.) at any level and is not aware of developments in the external environment relevant for girls and young women.  | The association has some connections with decision-makers (government officials, policy makers, community leaders, etc.) but does not know how to use those connections to influence effectively. | The association has solid connections with relevant decision-makers, is often part of broader meetings with civil society but has not used these connections effectively for influencing. | The association has established strong relationships with key decision-makers, is invited to key meetings, provides input into key policies, strategies related to girls and has used these connections for influencing. |  |
| **2. Stable partnerships** | The association has no partner organisations, or operates partnerships on an ad-hoc basis, and is not part of any network working on non-formal education, youth / girls and young women / development agenda. In general, the association operates in a very isolated manner.  | The association has started conversations with partner organisations and / or operates partnerships on an ad-hoc basis, but is not part of any network working on non-formal education, youth / girls and young women / development agenda. | The association has stable partnerships with relevant organisations and identifies which partners it needs to work with to achieve its objective. It is part of networks / coalitions working on non-formal education, youth / gender / development, but doesn’t have a leading role. | The association is viewed as a key partner and / or expert in the field, and has forged strategic partnerships. It has a leading role in a network/coalition working on non-formal education, youth/gender equality /development and mobilises other organisations around its cause, sets the agenda for the meetings.  |  |
| **3. Position/Policy Statements** | The association has never produced position statements / policy papers on issues relevant to its members or used WAGGGS position statements. | The association has position statements / policy papers or uses WAGGGS position statements. | The association has produced a few position statements or other influencing papers on the issues its members care about or modified the WAGGGS position statements to its context and used these for influencing. | The association has a set of position / policy statements that are based on strong research and evidence and is actively using them to affect change. Other organisations look to the association to produce such statements and at times use them for their own advocacy objectives.  |  |
| **Indicator No.** | **A** | **B** | **C** | **D** |  |
| **4. Campaigns** | The association has never run or supported campaign or community mobilisation initiatives and is not interested in / is opposed to such initiatives. | The association has only supported campaign and / or community mobilisation initiatives run by other organisations or WAGGGS but the association is interested to do more work in the area. | The association has supported campaigns and / or community mobilisation initiatives run by others; has initiated its own campaigns with limited success and is keen to develop further campaigns on issues relevant for its members.  | The association is known as the champion of girls’ rights in its community and has run successful campaigns / community mobilisation initiatives that have resulted in policy, legislation, practice and other change. |  |
|  |
| INFLUENCE: Standard 2 : Ability to influence |
| The association has institutional capacity and willingness to influence. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Leadership Vision & Direction for advocacy** | The association leadership / board do not know what advocacy is, has no advocacy strategy and/or is opposed to any advocacy initiative. | The association leadership / board do not have a clear understanding of what advocacy is, but is keen to develop skills and support advocacy initiatives. | The association leadership / board is supportive of and involved in some advocacy activities and keen to develop advocacy strategy but lack skills on how to strategically drive the advocacy work. | The association leadership / board provide vision and direction for advocacy and inspire members to take action. Influencing / advocacy strategy is in the association’s strategic plan. |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A** | **B** | **C** | **D** |  |
| **2. Dedicated advocacy team** | The association has no volunteers / staff dedicated to advocacy / influencing and has never had any advocacy training. | The association has a volunteer or member of staff working on advocacy. However, the staff / volunteers lack knowledge, confidence and skills in advocacy and / or are responsible for other areas and lack adequate time to contribute effectively. The association has never had training in advocacy. | The association has a dedicated advocacy team that has a good understanding of advocacy and develops sound advocacy strategies, including ensuring meaningful youth participation. The association has had training on advocacy in the last five years. | The association has a dedicated team that has developed sound evidence-based advocacy strategies and has experience with a range of advocacy tactics needed to achieve the advocacy objective. The team carries out research on the issues and finds sufficient evidence to advocate for the issue, including through youth participation. The association organises regular training for its volunteers and staff on advocacy. |  |
| **3. Financial resources** | The association has no dedicated financial resources for advocacy / influencing and no resources to support advocacy activities.  | The association has minimal dedicated financial resources for advocacy and / or the minimal resources it has are insufficient to advocate / influence effectively. | The association dedicates financial resources for advocacy initiatives where possible, but these are on an ad-hoc basis and are not anchored in organisation's strategic and financial plan. | The association sets aside sufficient financial resources for achieving its advocacy objectives boosted by facilities and technology available to support advocacy work. Financial resource allocation for influencing is part of the association's strategic and financial plan. |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **4. Ability to mobilize** | The association has not engaged and mobilised its members to participate in advocacy / influencing activities.  | The association is struggling to engage and mobilise its members to action. | The association is able to mobilise its members, but at times lacks consistency to keep the members engaged with the initiative or scale up the initiative. | The association is able to mobilise large share of its membership in the advocacy initiative through maintaining a strong link to the communities (girls, their families, schools, etc.) and actively involving them in identifying the advocacy issue to influence.  |  |
| **5. Tracking development related to girls** | The association has no expertise in understanding the social / political / legal processes / context that affect girls and young women so is unable to influence those. | The association is aware of developments in the areas relevant for girls but is not engaged in any activities to engage or influence.  | The association keeps track of developments in the areas relevant for girls and relies on partner organisations / coalitions to identify the gaps in policies and legislation. | The association is monitoring the developments in the field and has collected sound evidence to detect shortcomings in the policies / legislation or its implementation and is using that evidence to engage and influence decision makers. |  |

**III.6 Recruitment and Retention**

Membership refers to the number and demographic composition of all members (including children, young people, leaders and adult volunteers) within a Member Organisation.

An association’s approach to membership should include ways to make sure it is reaching out to all potential members in a society and offering them the opportunity to develop their skills as active citizens of the world.

Recruitment refers to the number of new members (including leaders and adult volunteers) joining the Member Organisation (previously referred to as growth).

Retention refers to the existing members remaining active in the Member Organisation or wider Movement.

|  |
| --- |
| RECRUITMENT & RETENTION - Standard 1: Data management |
| Membership data collection is done regularly in a way that allows the Member Organisation (or Component Association) to understand its composition and whether it reflects the composition of the country or community in which it operates. Data are stored, used, shared and destroyed appropriately. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
| **1. Membership Data** | Membership data is not collected.  | Membership data is collected in an ad-hoc way and does not include specific data that reflects membership diversity. | Membership data is collected at least annually and in a standardised way across the association. The data reflects membership diversity and provides useful information useful to the association for decision making processes. The association has policies and procedures in place for members to provide confidential feedback about diversity and inclusivity issues. | Membership data is collected at the point of recruitment in a consistent way and data collected reflects the diversity of membership composition. Membership data collection is set in a way that ensures no gaps in data occur.The association has policies and procedures in place for members to provide confidential feedback about diversity and inclusivity issues. |  |
| **2. Diversity & Inclusion within Membership** | Lack of awareness of the need for the membership recruitment and selection processes of leaders to reflect the diversity of the society in which the organisation operates. | The membership recruitment and selection processes of leaders partially reflect the diversity of the society in which the organisation operates, in an arbitrary manner. Diversity and inclusion are not necessarily considered in the recruitment and selection processes. | The membership recruitment and selection processes of leaders reflect the diversity of the society in which the organisation operates.Diversity and inclusion is a priority in membership recruitment and selection processes of leaders | The membership recruitment and selection processes of leaders fully reflect the diversity of the society in which the organisation operates.Diversity and inclusion is a priority in the recruitment strategy and selection processes of leaders, with clear goals and targets being set.The association has a diversity and inclusion strategy which regularly reviewed and updated. |  |
| **3. Membership Data Storage** | Membership data is not stored safely and effectively. | Membership data is stored safely and consistently e.g. personal data is not easily available for anyone in the association to access; however, it is not password-protected | Membership data is stored safely and effectively in line with appropriate data legislation, including guidance on password protection, sharing and destroying data.  | Membership data is stored effectively according to data protection legislation, is password protected and not accessible unless by designated individuals. Compliance is reviewed annually. |  |
|  |
| RECRUITMENT & RETENTION: Standard 2: Member Recruitment |
| The association has a strategy in place to recruit members in line with the data collected and analysed. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| **Indicator No.** | **A**  |  **B** | **C** |  **D** |  |
|  **1.Membership Recruitment Strategy** | The association does not have a membership recruitment strategy or plan in place.  | The association has a membership recruitment plan in place not linked to the overall strategy of the organisation and the element of diversity and inclusivity is not captured by this plan. | The association has a membership recruitment strategy and plan in place.There is strong reasoning about the direction of recruitment as it is based on previously undertaken research with its members. The association makes appropriate changes to try to increase recruitment. The association has a plan in place to address the topic of diversity of its membership. | The association has a membership recruitment strategy that has identified trends with the target market/audience, effective marketing and communication channels to reach that target market/audience and includes appropriate analysis tools. The strategy sets a new member target for the year and a plan on how to achieve it.The association understand the concepts of diversity and inclusivity as defined by WAGGGS, and current recruitment practices reflect an inclusive approach.  |  |
|  |
| RECRUITMENT & RETENTION: Standard 3: Member Retention |
| The association has a strategy in place to retain members in line with the data collected and analysed. |
| **For each indicator, please choose (A”, “B”, “C” or “D”) which best describes the current situation in your organisation.** | Please provide information to support your choice. |
| Indicator No. | **A**  |  **B** | **C** |  **D** |  |
| **1. Retention Strategy** | The association does not have a retention strategy or plan in place.  | The association has a retention plan in place, but membership diversity and inclusivity is not covered by this plan. | The association has a retention strategy and plan in place. The retention strategy and plan are developed based on previously undertaken research with its members and is reviewed and adjusted if needed. The association considers membership diversity and inclusivity in an ad-hoc way. | The association has a retention strategy that has used exit / non-renewal research, needs’ research of existing members, and trends with target market/audience to improve quality of Girl Guiding/Girl Scouting experience. The association understands the concepts of diversity and inclusivity as defined by WAGGGS, and current retention practices reflect an inclusive approach.  |  |