

Social Sector Practice

The Organizational Capacity Assessment Tool (OCAT): 2.0

Help your nonprofit organization assess its strengths and areas for improvement



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OCAT 2.0: Now online and open access

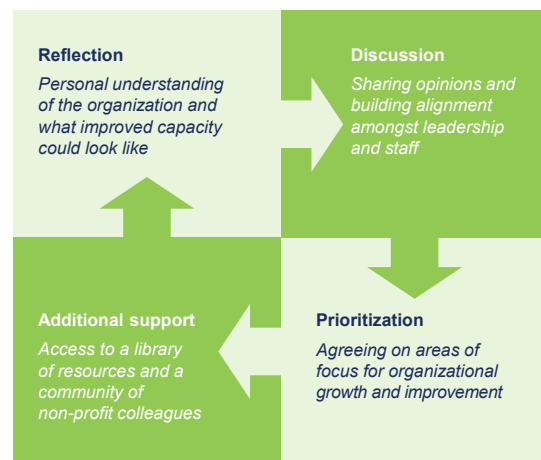
Since its launch a decade ago, the OCAT has been used by thousands of funders and nonprofits and translated into 13 languages.

The updated OCAT, which, like the earlier iteration, helps nonprofits evaluate and improve their organizational capacity, is now **publicly available** and **online enabled**, and has been **refined** based on user feedback and recommendations from the field.

OCAT 2.0 is sharper and easier

OCAT 2.0 features a more navigable structure, simpler language, a new advocacy module, fresh data analyses, and a supporting library of resources that include core documents from the field as well as debrief suggestions.

Benefits to organizations that take the OCAT



Great programs need great organizations behind them

Nonprofit organizations are admired for their passionate commitment and their inventive approaches to urgent social problems. As they play increasingly important roles in our society, it becomes even more critical for them to perform effectively—issues such as hunger, homelessness, or environmental conservation will not be “solved” in our lifetime, and therefore need strong organizations to continue to tackle them.

OCAT 2.0: Capacity Framework



But nonprofits are under great pressure to keep administrative costs low, which makes it easy to fall behind in building the organizational capacity necessary to achieve their aspirations. This is where OCAT 2.0 can help—and has helped.

What OCAT 2.0 delivers

We developed the Capacity Framework, which defines nonprofit capacity using a pyramid of ten essential elements.

The framework also has an updated optional advocacy-focused module that includes six additional dimensions.

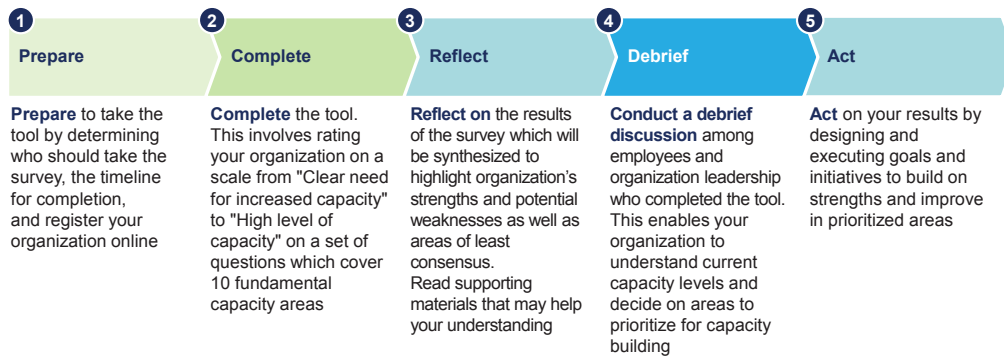
How it works

OCAT 2.0 is an updated and improved version of our original OCAT survey. It asks nonprofit staff to rate their organization’s operational strengths and weaknesses across ten dimensions—from management to marketing to technology and more—and then discuss the results, using the Capacity Framework and other supporting materials as a guide. The goal is to implement smart, effective organizational changes.

Sample OCAT question

		1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
I.	ASPIRATIONS				
IA.1	<i>How powerful is our vision as a guiding view of the future?</i>				
IA.1.a	Clarity of Vision Is our vision clear?	<i>Little shared understanding</i> of what organization aspires to become or achieve beyond the stated mission	<i>General shared understanding</i> of what organization aspires to become or achieve organizational aspirations, but <i>rarely used</i> to direct actions or set priorities – it exists mainly “on the wall”	<i>Clear and specific</i> understanding of what organization aspires to become or achieve; held by many within the organization and often used to direct actions and set priorities	<i>Clear, specific, and inspiring</i> understanding of what organization aspires to become or achieve; broadly held within organization and consistently used to direct actions and set priorities

Typical OCAT timeline

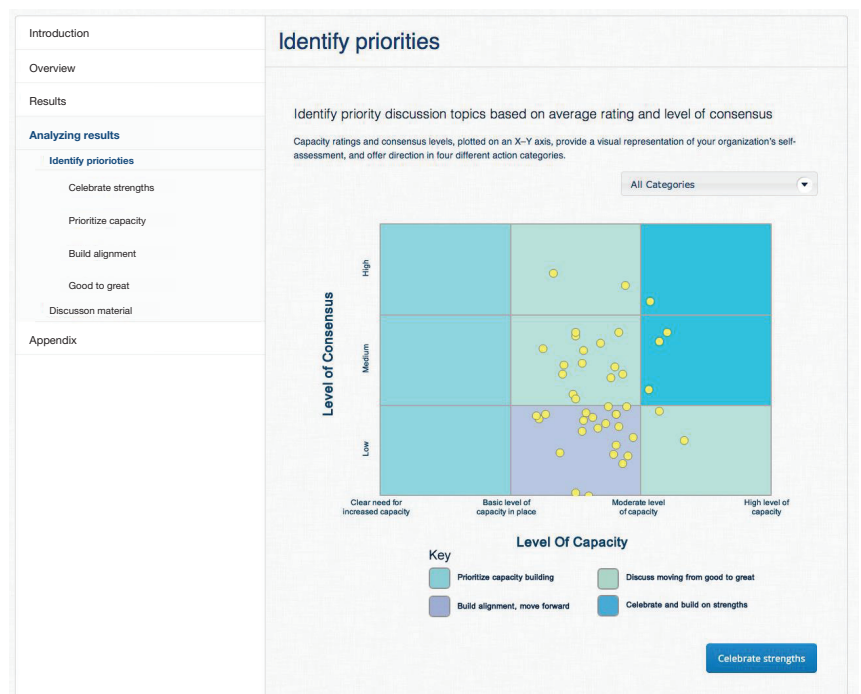


Results

OCAT 2.0 provides the data that will help your organization develop insights and take concrete steps toward change.

After your organization employs the OCAT, you will be presented with scores for the different Capacity Framework categories—that is, how your team rated your organization’s

- strategy
- funding
- leadership
- and other critical areas



You'll then be given a breakdown of responses, both at the organizational and individual level, as well as a detailed evaluation that addresses issues such as:

- How powerful is your vision as a guiding view of the future?
- How effective is your mission?

The OCAT will help you analyze these findings—showing the organizational areas where there was consensus and the areas where views varied. The analysis, in turn, helps your team build alignment, identify priority areas for improvement, and—just as important—celebrate your organization's strengths.

For articles, reflection guides, and additional resources, visit us at mckinseysociety.com/ocat.

Questions? Please contact us at OCAT@mckinsey.com.



