How we work

Strategy 2020 voices the collective determination of the IFRC to move forward in tackling the major challenges that confront humanity in the next decade. Informed by the needs and vulnerabilities of the diverse communities with whom we work, as well as the basic rights and freedoms to which all are entitled, this strategy seeks to benefit all who look to Red Cross Red Crescent to help to build a more humane, dignified, and peaceful world.

Over the next ten years, the collective focus of the IFRC will be on achieving the following strategic aims:

1. Save lives, protect livelihoods, and strengthen recovery from disasters and crises

2. Enable healthy and safe living

3. Promote social inclusion and a culture of non-violence and peace

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Annex 1

Comparison between BOCA, OCAC and other assessment tools

	BOCA	OCAC	STAR	SAF	DRCE
What is it?	Branch Organisational Capacity Assessment	Organisational Capacity Assessment and Certification	System for Transformation and Results	Safer Access Framework: Context-specific, principle-based, operational OD process to increase acceptance, security and access. www.icrc.org/saferaccess	The Disaster Response Capacity Evaluation (DRCE) is an evaluation tool which measures the Capacity of a DM system at a NS. It is often used as part of a Disaster Response Capacity Development program.
What does it assess?	30-40 areas based on 5 capacities to exist, to organise, to mobilise and relate, to perform and to grow.	90-94 areas based on 5 capacities to exist, to organise, to mobilise and relate, to perform and to grow.	6 areas related to organizational development (OD) capacity (communication effectiveness, M&E, adaptive design, people development, analysis, organizational learning), along with several enabling factors for performance on each of the six areas.	The process starts with an exploration of the NS' working context, operational realities and capacities in order to identify the root causes of the challenges and blockages to NS access and security. The 8 SAF elements which contain numerous actions and measures are then referenced to determine which ones the NS may take to sustainably address the challenges they have identified: Context and risk assessment, Legal and Policy Base, Identification, Acceptance of the Individual, Acceptance of the Organization, Internal Communication and Coordination, External Communication and Coordination and Operational security risk management.	The evaluation process measures the National Society Disaster Preparedness and Response Mechanism (DM system), through the components. The DRCE measures the change overtime in a NS working towards having a holistic evidenced based DM system. This model developed scoring for the DM system components of which 31 are identified, divided into 5 sub areas. Similar to OCAC, it has criteria and guidance notes for consistent application. The scoring uses a numeric system (1-5) and weights the scores into a graphical representation that can be viewed over time. The DRCE is not developing new systems, its merely a tool which brings together existing frameworks, measures them, and provides evidence.
Are they the same thing?	No – this is for branches only and lead to branch development plan and inform capacity building	No – this is an IFRC (and hopefully a Movement) wide tool to support NS development which will then lead to a second stage of peer review (evidence based) and looking at impact, scale, cohesion. This will lead to eventual certification to demonstrate excellence	No – STAR is an assessment- and analysis-based change process and tool suite (launched through a STAR Workshop) which promotes sustainable OD efforts. It is also an approach by which American RC (or another supporter) and a NS partner can strengthen their relationship by engaging around OD and through the provision of support to NS OD initiatives.	No-the SAF process is complementary to any broader OD approach. It is distinctly very operationally and contextually focussed, aimed at generating immediate and lasting results to increase NS acceptance, security and access. It can be slightly modified to be applied at all levels of the NS. It is applicable for all situations, particularly sensitive and insecure contexts, including armed conflict and internal disturbances and tensions. The resulting plan of action which will support and be integrated into the NS development plan can be supported by all interested Movement components.	No. The DRCE looks specifically at the existence of a comprehensive DM system at a NS. OCAC looks at the overall capacity of systems at a NS. The two assessments are linked, if OCAC is a 'health check' of a NS overall health, then one could say the DRCE is a health check on one of the systems (ex. the skeletal system), by having a strong skeleton, health is improved in many ways.

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How does this link to previous capacity assessment tools?	Developed in 2012-2013 by Netherlands RC and based on previous Swedish Branch Development tool and OCAC	Developed in 2010-11 by IFRC Secretariat in Geneva, and using learning from previous Characteristics of Well-Functioning Society (CWFNS) and other tools such as CBAR (American RC).	Developed in 2011 by American RC, building on findings and recommendations from the Global OD Study co-sponsored with the IFRC Secretariat (for which C-BAR was the research methodology)	Initially developed in 2003 and updated and formalized into a suite of print and online resources in 2013, the tool and recommended application process is based on solid input and real experience of dozens of National Societies. It has been integrated into the Well-prepared NS tool and is very complementary to the Federation's OCAC approach, offering an operational and pragmatic approach to NS capacity-building and organizational development, particularly focussed on addressing deficits in reputation/identity (acceptance) management, legal and policy base, external communications, human resource management, risk management or security and safety management. A benchmarking and monitoring tool has been developed that is very similar in structure, but different in content, to the OCAC.	For a more comprehensive understanding of a NS, the DRCE has been mapped against OCAC and SAF, so a NS can cross compare scores and determine areas they want to work on, and where intervention can synthetize the results of 1 or more assessment. SAF is being mapped against the DRCE so the two tools can be used together.
Why would a NS consider undertaking this?	Identify strengths and weaknesses; to support the development of a branch capacity building plan for specific or all branches; could be part of a wider organisational strengthening process such as branch reform	Identify/clarify strengths and weaknesses; contribute to wider NS organisational strengthening process; take stock and use in advance of strategic planning process or new direction; support for new leadership wanting to engage on key issues; bring in governance; establish baseline; use to enhance and coordinate partner/external support Unsure how well it is suited for NS undergoing institutional crisis.	To identify and analyse NS strengths and challenges; to identify short and long term OD objectives, plans and activities; to identify and prioritize action plans based on other assessment findings (e.g. OCAC) or broader strategies/development plans; to gather diverse perspectives across the NS and gauge consensus on key issues; to provide an opportunity for collaboration across various NS components; to generate buy-in to NS OD plans; to strengthen relationship with American RC (or another supporter); Not suited for NS experiencing significant institutional crisis.	The tool is particularly relevant for National Societies who have had, are having or anticipate having operational challenges or blockages to their acceptance, security and access to people in need in sensitive and insecure contexts. However it is geared to all NS and aims to achieve the following: to increase the NS ability to address the humanitarian needs of more people; prevent, reduce and or avoid security incidents which cause harm to staff and volunteers; better meet the challenges of today's complicated and evolving humanitarian environments, fulfil their mandate and roles in sensitive and insecure contexts and adopt a more structured approach to increasing their security and access	A NS would undertake a DRCE if they want to have an evidenced based external/peer evaluation of their DM system capacity in order to show change overtime. Humanitarian assistance (disaster response) is part of the Statutes of all NS (Article 4.3), while the Principles and Rules for Humanitarian Assistance (2013), this tool supports those core mandates being strengthened.
At what level can it be conducted?	Branch	Head Quarters and Branches (large)	National-level in scope (inclusive of both headquarters and branches); theoretically applicable in larger branches	Its primary target audience is NS senior staff and volunteers and governance (including branch leadership) however, it has been applied successfully in various ways at the branch level to enhance the security and access of operational teams.	The DRCE is to be conducted at the NS HQ level along with one branch, so the DM components can be seen more holistically and internal communications and systems at different levels can be observed.

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Is there a NS Model behind it?	Branch with members, running some services and activities, run by staff/volunteers and possibly with own governance/committee structure	Membership model Implementing services and programmes Staff structure and volunteers HR, Finance, Admin functions PMER, Logs, Communications Stakeholder engagement Resource mobilisation Branches which are relatively autonomous	No specific model (member-owned, self-owned, third party-owned) is implied/favored; national society should have HQ and field-based organizational structures in place and be implementing some programmatic activities	No specific model, it is applicable to all NS at all levels and in all its activities. However, it is grounded in the operational application of the Fundamental Principles and the Safer Access Cycle: access, perception, acceptance and security.	Yes. Disaster Response Capacity Development (DRCD) model/approach to support the findings of the tool. The DRCD approach uses both DM and OD principles, This iterative approach works in smaller increments that are within the NS capacity and resources at a particular time. The iterations time period will also depend on the NS and when a change in capacity or context may indicate the best time for review. Key enablers of the approach are leadership, partnership and relationships.
What is the composition of the assessment team	Staff and volunteers (possibly governance) of 4-8 people.	Staff and Governance from HQ and branch 10-15 people.	12-25 people representing a diverse cross-section of the organization (HQ staff, branch staff, board members, volunteers, program staff, support unit staff, etc.).	15-20 leadership staff, governance and volunteers from HQ and branch from diverse areas of the organization.	An assessment team consists of 5-7 trained peer evaluators, and a controller who is the focal point for running the evaluative simulation. The evaluation team is an external team, made up of peer NS, Support NS (PNS), and IFRC- in some cases ICRC if trained evaluators are available.
How long does the assessment take?	2-3 days Introduction and consensus building/prioritisation and problem analysis/plan development	2-2.5 days Context and introduction, consensus building/prioritisation	The assessment is one day of a three-day STAR workshop with all 12-25 participants (1 day of assessment; 2 days of analysis and planning); two days of smaller preparation and planning meetings with senior leadership and key personnel are also required (one before and one after the workshop)	Ideally 3 days, but can be done in 2 depending on the level of SAF understanding and knowledge of the participants.	The assessment is done through a scenario based simulation, where early warning messages are sent 1-2 days before an evaluation team arrives, this tests the early action of the NS. The simulation is on-going for 4-5 days. Although everyone in the NS has a role to play during a disaster, NS still function during this time. The simulation therefore is reactive, and parts of the NS are activated through triggers, but business as usual operations continue
What is the methodology?	Self-assessment – facilitated by NS staff	Guided self-assessment – external facilitation Some consideration of contexts and if political and financial considerations are a barrier	Self-assessment, analysis and planning sessions facilitated by external personnel (e.g. from American RC or another partner) yielding a 100-day Plan. This plan generates significant outputs/outcomes while laying the groundwork for longer-term OD initiatives and further American RC OD support.	Levelling of the understanding of the SAF tool and approach; exploration of their operating context; experience-based lessons learned (past, present, anticipated) exercise to identify the root causes of the gaps/challenges and barriers to acceptance, security and access; benchmarking and planning/prioritizing exercise. As the context changes, the process should be revisited. The NS is encouraged to use the SAF as a reference on an on-going bases during operations. Monitor progress using the benchmarking/monitoring tool.	External evaluation for a full scale DRCE, evaluators score through consensus their observations of the simulation over the course of a number of days. The results are presented to the NS by the evaluation team, later a 1-2 day workshop is conducted where the NS determines the underlying factors and key issues to address to improve areas of their DM system. Priorities are made, although as the components are interlinked, many areas of the DM system can benefit from the prioritized interventions.

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What comes out of the process? Outcome	Weaknesses identified, areas prioritised and draft of a capacity building plan developed	Weaknesses identified collectively and priority areas to be improved are highlighted	NS moves forward on assessment- and analysis-based OD plans with support from American RC (or other partner supporting the process) as appropriate; momentum for OD plans and working relationships established/reinforced across a diverse cross-section of the NS; stronger partnership between the NS and American RC (and/or other partner(s)	Transformative changes have resulted from applying the SAF in order to reposition the NS for increased acceptance, security and access. Concrete actions are identified and taken to address the root causes of the gaps, challenges and barriers to acceptance, security and access.	Out of the process comes an evidenced based external 'health check' which a NS can use to understand their capacity or measure their progress towards their DM Strategy. For externally funded programs it can be used as a base line, midline or end line.
How is this recorded? Output	Table of strengths and weaknesses and skeleton of capacity building plan	Report written by IFRC with recommendations to be shared with zone director and NS and is confidential unless NS decides to share it	Completed assessment scoresheets and collated results report; outline of a proposed 100-day plan, including draft milestones and roles and responsibilities; draft objectives and activities for a longer-term OD initiative; subsequent agreements with American RC (and/or other partners(s)	A report, containing the key outputs such as the challenges, gaps and barriers to acceptance, security and access, plan of action and benchmarking results is written by the facilitator and shared with the NS and the ICRC delegation. Together with the ICRC delegation the NS further develops its SAF plan of action, integrating it into its NS development plans, takes action supported by various Movement components and monitors progress.	The results are captured in an excel file, which is set up to visually show the results through graphs and thus showing change overtime. Through a facilitated priorities workshop, the NS can record key priorities, either to add to, or determine areas of their Strategy and mandate to further work on.
What support is available?	Internally – from HQ and other branches but also as part of existing programme budgets Externally – depends if conducted with any partners who are/could consider supporting branch development	This may be linked to the IFRC Capacity Building Fund in the future for scaling up services NS encouraged to share report and/or action plan with partners to seek further support	American RC will only engage in the STAR methodology if it has available resources to support the follow-up activities that the NS identifies for itself as part of the process; the exact nature and significance of those resources is negotiated with each NS on a case-by-case basis. (Also note that using the STAR methodology is not a pre-requisite for receiving OD support from American RC.) Optional project management tools are available in the STAR tool suite. Workshop with one of their NS partners; however, American RC would be open to providing technical support should interest exist.	The ICRC is developing a facilitator pool comprised of NS and ICRC representatives to support the facilitation of the 2-3 day workshop. The plan of action can be supported through ICRC (integrated into the PfR process) or through other strategic or operational partners of the NS. A toolbox of 'how to' guidance is being developed for some of the SAF actions and measures. Peer to peer exchanges and issue-based round tables are taking place to further inspire National Societies and contribute to their learning.	Currently there are a number of trained evaluators within NS who are partaking in programs which use this tool. There are also evaluators within the IFRC at the Regional level in Africa/Asia/Americas. Currently a roster has not been established. The DRCE toolkit exists in French/English and Spanish.

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Who is involved or has done a pilot already?	Piloted in Uganda in Jan 2013 and Malawi in September 2013, Cambodia in Oct 2014 Refer to Annex 4 for recent implementation Developed by NLRC and some support from other PNS on methodology and testing In English Available in French	Piloted since 2011 in over 60 countries in all zones – see list below Developed by PPD (now Learning and OD) dept. in Geneva Available in English, French, Russian, Spanish and Arabic. On version 2.0 at present.	As of September 2014, the following NS have engaged with American RC using the STAR methodology: • Bahamas RC • Belarus RC • Chile RC • Colombia RC • El Salvador RC • Kazakhstan RC • Kyrgyzstan RC • Namibia RC • Peru RC • Uganda RC • Zimbabwe RC	Dozens of NS have been working with the Safer Access tool for over a decade. The updated materials were produced late 2013, and in 2014, seven NS underwent the structured facilitated SAF Assessment and Planning workshop • Philippines RC • Georgia RC • Ukrainian RC • Kenyan RC • Somali Red Crescent • Egyptian Re d Cross NS and ICRC will continue using the Safer Access approach as a guide in all their joint OD/CB work, even if the structured workshop is not applied.	The original tool was developed by the IFRC Reference Centre in the Americas, through funding provided by the Canadian Red Cross First Responder Initiative (Honduras/Nicaragua/Haiti and Dominican Republic). Since then the tool has been used as well in the following NS: Democratic Republic of Congo, Mali, Ethiopia, South Sudan, Afghanistan, Pakistan, Myanmar (self -audit), Jamaica. Evaluators exist in all NS who have had an evaluation process completed as well as: South Korea, Canada, British, Finland, Norway, French, Netherlands St. Vincent, Grenada, Guyana and the IFRC Regional Offices in Africa/Asia and Americas
Where can I find more information about it?	You can find key documents on Fednet or contact: Asia Pacific BOCAC Hub Lab, c/o Bangladesh Red Crescent Society, 684-686, Red Crescent Sarak, Bara Moghbazar, Dhaka-1217 Bangladesh Tel: +88 029330188-9 Or Md Adith Shah Durjoy, OD Manager, IFRC Bangladesh adithshah.durjoy@ifrc.org Mobile: 01818257651	You can find key documents on Fednet or contact Roger Fischli (roger.fischli@ifrc.org /+41 22 730 44 83).		You can find key documents on saferaccess.icrc.org. Some tools related to specific elements that were developed by NS can be found in Fednet under NSKD. You may also contact Catherine Martin (camartin@icrc.org/+41 22 730 2919).	

Annex 2

BOCA Training of Facilitators Program

Training of BOCA Facilitators
Venue | Date

Program

Day 1		
8:00 – 8:30	Arrival	Registration	Hotel & Secretariat
8:30 – 9:00	Opening Ceremony	Invite SG and Branch Head
9:00 – 10:00	Introduction to BOCA	By Lead Trainer
10:00 – 12:00 nn	Division into groups	Practice	Demo	By Trainers
12:00 nn – 1:00	Lunch Break	
1:00 – 6:00	Group Practice	Return demo	Group practice		By Facilitators
6:15	*Session ends (each group may decide to meet in the evening to practice and review)*	

Day 2		
8:00 – 12:00 nn	Group Practice	Return demo	Group practice		By Facilitators
12:00 nn – 1:00	Lunch Break	
1:00 – 6:00	Group Practice	Return demo	Group practice		By Facilitators
6:15	*Session ends (each group may decide to meet in the evening to practice and review)*	

Day 3		
8:00 – 12:00 nn	Group Practice	Return demo	By Facilitators
12:00 nn – 1:00	Lunch Break	
1:00 –5:00	Facilitators prepare their materials and travel to branches for the pilot BOCA exercises	BOCA Facilitators post on FB when they arrive at destination to inform that they arrive safely.

Day 4 and 5 (BOCA at pilot Branches)
Starts at 8:00 until 5:00 daily for 2 days (Facilitators required to post on FB their progress per session) The teams need to return back to the main venue at the end of the day 5 immediately after finishing.

Day 6		
8:30 – 12:00 nn	Discussion on key issues faced at branch Role of Facilitators Agreeing on who are the Lead Facilitators + members Developing the Master schedule by group + presentation	By Facilitators
12:00 nn – 1:00	Lunch Break	
1:00 – 3:00	Monitoring and Evaluation of BOCA	
3:15	*Session Ends and departure of participants*	

Checklist for organizing BOCA Facilitators Training

Actions		Status	Note	Responsible by
Initial Preparations				
1.	Endorsement by Nat HQs to accept and commit to implement BOCA (use the BOCA 1-page Hand-out in Annex 5 to support this).			
2.	Appoint the FOCAL Person for branch development matters and BOCA.			
3.	ADAPT THE BOCA ASSESSMENT MATRIX (ATTACHMENT Z – Section 1) to your own National Society contexts, merging your current branch assessment tools (if any) into the BOCA.			
4.	TRANSLATE the main BOCA documents into national language i. Branch Organizational Capacity Assessment: A Practical Guide **(Principle Document)** ii. BOCA Training for Facilitators (ToF) Step by Step Guide **(Attachment X)** iii. Guide for BOCA Facilitators **(Attachment Y)**; iv. BOCA MATRIX **(ATTACHMENT Z – Section 1)**; v. Explanatory notes to BOCA Matrix **(ATTACHMENT Z – Section 2)** – Optional			
5.	Clearly define TOR in relation to BOCA for Nat HQs, BOCA Facilitating Teams and Branch Assessment Team.			
6.	Work in consultation with Branches on preliminary schedule dates for BOCA exercise (1-2 months prior to BOCA Facilitators' Training) including Contact Points at each respective Branches.			
A. Pre-BOCA Facilitator Traning				
7.	Identify Trainers to conduct BOCA Facilitators' training.			
8.	Select participants to attend the BOCA Facilitators workshop. Ensure diversity of your participants e.g. some are from HQ, some are from branches and regions; some from the different programs; some are from the OD Dept.			
9	Identify and book BOCA Training venue.			
10.	Send invitation to the BOCA Training participants.			
11.	Confirm venue and sign contract.			
12.	Identify and inform 3-4 branches to be the hosting branch that will host the first BOCA exercise (field exercise for participants). Guide them on how to prepare e.g. 12-15 diverse assessment team members; 2-days schedule; fill out Annex 7a, 7b and 7c. Set deadline for submitting those annexes with information filled in.			
13.	Inform the Chairpersons of the 3-4 branches to make a 30-minute session in the BOCA exercise in their respective branch, basically to present Annex 7a, 7b and 7c. This must be written in the flipchart already so as not to waste time.			
14.	Send official letter to all branches informing them that all branches will undergo self-assessment and that the schedules and facilitation teams will be circulated to them in due course.			
15.	Discuss with Program Directors/Managers e.g. Health, DM, etc and ask for subsidy of BOCA in branches where their programs/projects are implemented (if applicable).			
16	Discuss with ICRC and ask for support of BOCA in branches where their programs/projects are implemented (if applicable).			
17.	Discuss with PNS representatives and ask for subsidy of BOCA in branches where their programs/projects are implemented (if applicable).			
18.	Photocopy the bilingual Principle Document; Attachment X & Y. One copy for every participant of the BOCA facilitators training.			

Annex 3

Checklist for organizing BOCA Facilitators Training

Actions		Status	Note	Responsible by
19.	Photocopy the bilingual BOCA Matrix (Attachment Z – Section 1). Bind. (20 is needed for the facilitators training. Each pilot branch will need 15 each (multiply this with the number of pilot branches for total copies to be printed). Also photo-copy the Explanatory Notes to BOCA Matrix – AttachmentZ – Section 2) only for the ToF participants and Facilitators (if not translated, English is fine)			
20.	Send the BOCA Matrix (Attachment Z) to the first 3-4 branches that will do the BOCA exercise immediately after the training. Each assessment team to receive 15 copies, one for each assessment team member.			
21.	Arrange transport, if needed, for movement of facilitation team to the 3-4 branches who will do BOCA exercise. Ask host branch for assistance, if needed. If team needs to sleep overnight at the branch, arrange accommodation.			
22.	Prepare the materials and equipment for the BOCA Facilitators Training. – Printing of Vinyl (PVC banner) Matrix with detachable topics (few sets, according to the number of Branches) – Refer to Annex-20 – Permanent marker pens – 3 boxes for each colour (Red, Blue & Black); – Blue tack or masking tape 10 rolls; – 3 rolls poster/flip chart papers (or 15 sets if not rolled); – LCD Projector c/w portable screen; – Printer with enough ink; – Rulers and other office stationeries; – White board (1 inno) & Flip chart stands (4 innos).			
23.	BOCA T-shirt for BOCA Facilitators. Prepare design but make prints just small, not too big – (Optional).			
24.	Receive the Annex 7a, 7b and 7c of the first 3 branches that will do the BOCA exercise.			
25.	Arrange hotel accommodation for BOCA Facilitators.			
26.	Arrange airport pick-up for BOCA Trainers OR, send guidance note on how to proceed to hotel.			
27.	Final preparations for BOCA Facilitators Training.			
B. BOCA Facilitator Traning				
28.	Conduct BOCA Facilitators Training (2.5 days).			
29.	Conduct BOCA exercises at 3-4 pilot branches (2 days).			
30.	Conduct wrap-up session and forward planning for BOCA implementation (1 day):- – Identify Lead Facilitators; – Establish Facilitation teams; – Agree on Facilitation assignments, role of lead facilitators; reporting format, HQ focal person; – Develop master schedule; – Develop budget for each branch facilitation (using public transport).			
31.	At the wrap-up session of the BOCA Facilitators Training, share information about who is the focal support person for BOCA affairs at HQ. He/she shall support the BOCA Lead Facilitators in the conduct of BOCA in various branches.			
C. Post BOCA Facilitator Traning				
32.	Arrange for transport for trainers' and participants' departure back to their NS or branches.			
33.	Send a memo to all branches informing them of the master schedule and the Facilitation team assigned for the BOCA exercise in their respective branches.			

Checklist for organizing BOCA Facilitators Training

	Actions	Status	Note	Responsible by
34.	Send BOCA Assessment Matrix (Attachment Z – Section 1), Annex 7a, 7b and 7c to all branches.			
35.	Prepare the Certificates for the Branches on successful completion of BOCA (Annex 13a).			
36.	BOCA Lead Facilitator confirms individual branch BOCA schedule and ensures proper assessment team. Thereafter, team conducts the BOCA exercises in various branches.			
37.	Lead Facilitators upload the BOCA results to RMS, if available, with hard copies submitted to the NS HQs immediately.			
38.	BOCA Analysis Meeting to be convened when more than 50% of the branches have completed the BOCA exercise.			
39.	Prepare BOCA Certificates for Facilitators (Annex 13b) when BOCA exercise is completed.			
40.	Award BOCA Certificate for Branches (Annex 13a) that have completed the BOCA exercise.			
41.	Develop master schedule for the branch development follow-up at a 12 month period.			
42.	Branches and National HQs to constantly monitor on the progress of the implementation of the Priority Activity Planning (PoA).			
43.	National OD/BOCA Focal Person shall convene a final analysis of the BOCA scoring results including analysis of Annex 7A, 7B, and 7C information to determine an organization-wide trend for NS development framework and strategic planning.			

Annex 4

Resources contact and BOCA Implementation in NS

BOCA, as a branch development tool of choice, is being implemented in an increasing number of National Societies across the world.[1]

The conduct of a BOCA at the branches needs to be done by National Society staff. It is only during the conduct of the BOCA Training of Facilitators where international facilitators are being mobilized for support.

This resource list will provide any BOCA facilitator and any National Society a support group of individuals who are very experienced in BOCA implementation. They are all connected on the BOCA Facilitators Group in Facebook. We encourage you therefore to join the BOCA Page in Facebook at *https://www.facebook.com/groups/RCRC.BOCA/*.

The Resource Persons

	Name	Title	Contact details
IFRC Geneva			
1	**Ian Steed**	Senior OD Officer IFRC Geneva	ian.steed@ifrc.org
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IFRC Asia Pacific			
3	**Alex Torres**	Volunteering Development & OD Delegate	alex.torres@ifrc.org Skype: alex.torres8
4	**Md Adith Shah Durjoy** IFRC Bangladesh	OD Manager	adithshah.durjoy@ifrc.org Mobile: 01818257651 skype:md.adith.shah.durjoy ❙ FB: Adith Shah Durjoy
5	**Lak Monyrasmey** IFRC Cambodia	OD Manager	lak.monyrasmey@ifrc.org
6	**Bhaveshkumar Pratapsinh Sodagar** IFRC CCST Delhi	OD Manager	bhavesh.sodagar@ifrc.org +919810399620 Skype: bsodagar ❙ FB: Bhavesh Sodagar

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1 Afghanistan Red Crescent, Bangladesh Red Crescent, Cambodia Red Cross Society, Democratic Peoples' Republic of Korea Red Cross Society, Indian Red Cross Society, Ivory Coast Red Cross Society, Malawi Red Cross Society, Malaysia Red Crescent, Mongolian Red Cross, Myanmar Red Cross Society, New Zealand Red Cross, Pakistan Red Crescent Society, Palestine Red Crescent, Timor Leste Red Cross Society, Uganda Red Cross Society, Zambia Red Cross Society, Zimbabwe Red Cross Society

International Federation of Red Cross and Red Crescent Societies
Branch Organisational Capacity Assessment (BOCA) | Annexes

Annex
4

Resources contact and BOCA Implementation in NS

	Name	Title	Contact details
7	**Kumju Hu** IFRC-CCST Bangkok	SEA Youth & Volunteering Officer	kumju.ho@ifrc.org +66844277330 Skype: kumju.ho ǀ FB:Jenny Ho IFRC
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10	**Gebrie Belete** Ethiopia	consultant	gebriea@gmail.com
Europe			
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12	**Frank Dewez** Netherlands Red Cross		FDewez@redcross.nl
13	**Shahina Bahar** British Red Cross	Senior National Society Development and Partnership Advisor	SBahar@redcross.org.uk
National Society – Afghanistan Red Crescent			
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18	**Taib Yusufsai**		
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Annex 4

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Annex
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Annex 5

BOCA 1 – page Hand-out

What is a Branch Organisational Capacity Assessment (BOCA)? A Brief Overview

In order to be able to effectively meet the humanitarian challenges of saving lives and preventing human suffering, it is important that branches continually assess and develop their capacity. Strong branches are the key to a well-functioning NS.

BOCA is a self-assessment tool developed for branches of NS to identify and assess their strengths and weaknesses in relation to a wide range of organizational capacities. It can be used as the first step in a branch development process since it is focusing on basic capacities, structures and conditions that are widely understood as being the core of what a branch needs to be able to function and perform well.

BOCA has 3 objectives:-

1. To appreciate the organizational capacities of the branch and how it is currently performing;
2. To reach a consensus on priorities for branch enhancement;
3. To develop an operational plan to strengthen and sustain its services delivery capacity and resilience of the communities.

BOCA is not about testing or examining the branch, but rather to identify - through a self-assessment exercise – the current capacity of the branch, and agree on areas for further enhancement. It can inspire the branch to work harder for the improvement of their branches after going through the process and understanding more clearly which areas need attention and gathering momentum on how to collectively address the issues that arise. Additionally the process can also support branches to create an important line of sight back to the overall NS operational plans and implement strategy by collecting and aggregating branch development plans in a realistic and efficient manner.

A BOCA undertaken at branch should not be just a standalone process but should be linked to a NS's own Branch development framework (if one already exists) and integrated into existing systems, and integrated with its overall NS development framework in order to achieve increased relevance, quality, reach and sustainability of services rendered to communities.

Budgeting of NS BOCA Program – National Budget

No.	Details of Expenditure	Amount	Explanatory Notes
National HQs			
1	Meeting expenses		
2	Review, Adaptation and Translation of BOCA documents and resources		
BOCA Facilitators' Training			
3	Transport & Travelling		
4	Meals & Refreshment		
5	Accommodation		
6	Venue & Equipment Charges		
7	Stationeries & Printing		
BOCA Implementation at Branch level*			
8	Transport & Travelling		
9	Meals & Refreshment		
10	Accommodation		
11	Venue & Equipment Charges		
12	Stationeries & Printing		
BOCA Analysis Meeting			
13	Meeting expenses		
14	Transport & Travelling		
15	Meals & Refreshment		
16	Accommodation		

*   Expenses for Branch BOCA Exercise may be borne by Branches with partial subsidies from National HQs

Annex 7a

Branch information sheet

1	Date of completing the form			
Basic information				
2	Branch name			
3	Postal address			
4	Email address (Head of branch)			
5	Telephone number of Office			
6	Date of establishment			
Context information				
7	Constituency name			
8	Population number and breakdown of Gender and Age if possible			
9	Main humanitarian challenges (include who are the vulnerable groups)			
10	Other humanitarian agencies			
Branch information				
11	Number and position of paid staff			
12	Branch manager name			
13	Number of active volunteers	Male:	Female:	
14	Total number of volunteers	Male:	Female:	
15	Number of paying members	Male:	Female:	
16	Date of last general assembly			
17	Main RC (internal and external) supporting partners			
18	Do you have a current annual operational plan?	Yes / No		
19	Do you have a current annual report?	Yes / No		
20	Number of beneficiaries receiving support (for last year)	Program	Male:	Female:

Document available for download from CD.

Branch Activity and Financial Context

Note: Branch to report using this Annex for session on "Introduction to the Branch"
Blank Annex 7b (without examples) to be sent to branches

Section A				Budget (in local currency)			
A.	Activity/Programs	status	target group	donor	Last year	This year	Next year
				Total			

Section B			Budget			
B.	Admin cost	donor		Last year	This year	Next year
		Total				

Section C			Budget			
C.	Branch Development	item	donor	Last year	This year	Next year
		Total				

	Budget		
Integrated Expenditure budget	Last year	This year	Next year
Total Expenditure			

Section D		Budget		
D.	Income	from	Last year	This year	Next year
	Total Income				
Balance Income – Expenditure	Total			

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Annex 7b/1

Example of Branch Activity and Financial Context incorporating Branch Priority Activity Planning (PoA)

Section A				Budget (in local currency)		
A.	**Activity/Programs**	**status**	**target group**	**donor**	**Last year**	**This year**	**Next year**
1	First Aid	funded	training vol. - 10 in 20 villages	own	200	220	240
			training TBA - 2 in 20 villages				
2	HIV/AIDS	funded	peer educators - 20	NLRC	600	650	325
			home based care - 300 farm				
3	WASH	planned	Training vol – 20 in one village	IFRC	100	100	100
				Total	**900**	**970**	**665**

Section B			Budget		
B.	**Admin cost**	**donor**	**Last year**	**This year**	**Next year**
1	salary Branch Mgr.	HQ	10	11	12
2	salary 2 guards	own	6	7	8
3	office utilities	own	5	5	5
4	General Assembly	own	5	5	5
5	vehicle maintenance	local govt.	4	10	4
6	communication	own	5	5	5
7	networking	HIV/Aids program	5	5	5
8	Focal person salary	HIV/Aids program	6	7	8
9	finance staff salary	50% own, 50% HIV	8	9	10
		Total	**54**	**64**	**62**

Section C				Budget		
C.	**Branch Development**	**item**	**donor**	**Last year**	**This year**	**Next year**
1	training board members	4 persons	own	5		5
2	training VCA	4 vol. per community (10)	IFRC	20		20
3	membership recruitment	campaign	own	5	5	5
4	resource mobilization	new IGA	Rotary		50	
5	motorcycle purchase	Yamaha 350cc	HIV/Aids	30		
6	support RC structures	10 structures	Swedish RC	10	10	10
7	develop RC youth clubs	10 schools	own	5	5	5
8*	Dissemination of RCRC knowledge & principles	5 branches (2016) 8 branches (2017)	own		25	40
9*	Volunteer Development & Management	250 volunteers (2016) 500 volunteers (2017)	own		5	10
			Total	**75**	**100**	**95**

		Budget		
	Integrated Expenditure budget	**Last year**	**This year**	**Next year**
A	Programs	900	970	665
B	Administrative costs	54	64	62
C	Branch development costs	75	100	95
D	Resource Mobilization/Fundraising	300	500	700
	Total Expenditure	**1329**	**1634**	**1522**

Section D			Budget		
D.	**Income**	**from**	**Last year**	**This year**	**Next year**
1.	own	Membership fees	200	220	240
		Income Generating Activity (IGA)	16	17	18
		Donations – public or business	19	14,5	20
		In-kind support (if valued)			
2.	NS	HQ	10	11	52
3.	local partners	Local authorities	4	10	6
		Rotary		80	
4.	External Partners (Movement and non-movement)	Netherlands Red Cross	645	666,5	343
		Swedish Red Cross	15	15	15
		IFRC	120	100	120
		KOICA			8
		Total Income	**1029**	**1134**	**822**
Balance Income – Expenditure		**Total**	**0**	**0**	**0**

Note: Budget planning to incorporate priority activity plan (Branch PoA) into the current and following year budget.

See Section C item 8 & 9 above, being activities from Annex 15b taken into account for this year and next year budgeting.

Document available for download from CD.

Branch Inventory of Assets (with examples)

Blank Annex 7c (without examples) to be sent to branches

Ref #	Item	QTY	Type	Condition (new, good working condition, used, damaged, not working)	Location	Serial # (if available)	Department/ Unit/Person Assigned if applicable
1	3-ton lorry	1	Isuzu	new	Branch HQs, Timbaktu	Reg No. SN9884	DM Manager
2	Laptop	3	Acer	1 unit – new 2 unit – working condition	1 unit – Hataha Chapter 2 units – Branch HQs, Timkaktu		OD Manager

Annex 8

BOCA Training of Facilitators (ToF) Reporting Template

Report On

BOCA Facilitators Training conducted in XXX Red Cross/Crescent

Picture

Report submitted by:

Trainers name and contact details

Date and year

The report should not exceed six pages.

Document available for download from CD.

BOCA Training of Facilitators (ToF) Reporting Template

1. INTRODUCTION:

2. PARTICIPANTS:

> *Graph: the above graph depicts the representation of participants from different level .... and gender ... of the NS*

3. FACILITATORS OF THE TRAINING:

4. CONTENTS OF THE TRAINING: (give brief overview only)

The main contents of the training at a glance were:
- Introduction to BOCA
- Practice in the group and demonstration
- Introduction to RMS and uploading of BOCA findings
- Orientation of BOCA reporting template
- BOCA exercise at Branches
- Sharing of lessons learnt, best practices and the things to improve
- Development of master schedule of BOCA exercise by the facilitators in all branches of XXX Red Cross/Crescent Society

5. OUTCOME OF THE TRAINING:

Below is an example
- 7 teams of facilitators comprising 2-3 members led by a Lead facilitator
- Master schedule of all 7 teams for conducting BOCA at branches and/or chapters of XXX Red Cross/Crescent Society

No	Lead Facilitator	Co-Facilitators
1		
2		
3		
4		
5		
6		
7		

Annex 8

BOCA Training of Facilitators (ToF) Reporting Template

6. IDEAS FOR MOTIVATING BRANCHES TO UNDERTAKE BOCA PROCESS PROACTIVELY:

7. RECOMMENDATION OF FACILITATORS:

7.1 On NS BOCA process:

7.2 BOCA Facilitation (notes for others to consider):

7.3 Practical Guidebook to be revisited with necessary contextualization and explanation.

8. UTILIZATION OF LEARNING:

9. WRAP-UP AND CONCLUSIONS:

9.1 Things Done Well:

9.2 Recommendation for improvement:

PHOTO GALLERY

Training of Facilitators (ToF) Evaluation Form

Date: _____ Venue: _____ Trainers: _____

Question		Strongly agree	Agree	Neutral	Disagree
1.	The workshop objectives of the Training were clearly defined				
2.	Participation and interaction were encouraged				
3.	The content was organized and easy to follow				
4.	The materials distributed were helpful				
5.	The training experience will be useful in our work				
6.	The trainer was knowledgeable about the training topics				
7.	The trainer was well prepared				
8.	The training objectives were well met				
9.	The time allocated for training was sufficient				
10.	The facilities were adequate and comfortable				
11.	The food was nice				

12. Describe what aspects of the workshop were particularly successful

13. List any training techniques or activities that helped to achieve the workshop objectives. Please name the session that they were used in.

14. Were there any training materials that helped achieve the workshop objectives? Please name the session that they were used in.

15. What did you like most about this training?

16. What aspects of the training could be improved?

Please return this completed form to the Trainer.
Thank you for the feedback!

Annex 10

Template for Working Budget of BOCA Exercise in Branches

No	Item of Expenditure	No of Unit	No of days	Unit rate	Total	Explanatory Notes
1	DA for facilitators					
2	Accommodation for facilitators					
3	Transport & Travelling					
4	Meals & refreshment					
5	Stationeries					
					Total		

Document available for download from CD.

Cabo Branch Case Study & Summary Guide

Focus for facilitators: this Case Study is about community engagement and sustainability of branch activities.

The Cabo RC Branch case

Cabo RC Branch was completely dependent on external funding for many decades and its volunteers reduced to 40 while the external funding was phasing out. The Branch leadership decided to make some drastic changes, due to its unreliable external financial resource base. Many other NGOs in the country were working with the communities they were serving. This prompted the leadership to rethink their work and find a more reliable solution. It turned to the communities it worked with, or could work with. The RC Branch decided to go to the communities so that together they could decide on what to do. At the community, the Branch admitted that it did not have a lot of money but wanted to support them with the little it had. The Branch asked what could be done to support the community and its most vulnerable people.

To the surprise of the Branch, the communities tried to understand their situation. They said: *"Because you have a lot of knowledge about all sorts of things that are important to us, we could (start to) organize ourselves (better) in community groups, learning from your knowledge and experience, so we can help ourselves and our neighbors in need. We have many people interested in volunteering and working for their fellow vulnerable community members."*

This opened the eyes of the Branch staff as they had thought that external resources (money, Branch volunteers, hand-outs) were needed to provide essential support. Now, they could see the potential opportunities and local resources available which they could utilize.

The Branch started to engage more seriously with the local communities. It assisted them in setting up simple local RC structures or groups, building on the local voluntary traditions and laws, and reflecting transparent procedures for decision-making. The volunteers, being from the local communities, did not need any transport or other compensation because they had identified and were addressing their own local needs. The Branch provided training to the local volunteers on how best to provide services, within their mandate and mission statement. Further, it tried to find how best to maximize the mobilization and involvement of the community as well as the resources involved, and how to minimize the costs and efforts needed to support them.

The National Society HQ learned from this Branch approach and introduced it to other branches. Over a period of time, a number of new structures were formed in communities throughout the country. All these structures were supported by local RC Branches with guidance from the regional and national headquarter levels. Today, the National Society has many local RC Branch structures, thousands of local volunteers, and many new members, as well as well-wishers supporting its work.

Annex 11a

Cabo Branch Case Study & Summary Guide

Cabo Branch Case Study Summary Guide

What were the problems/challenges faced by Cabo RC Branch and the community?

- Dependence on external funding support for activities;
- Lack of sustainable community level services and coverage which reduced number of volunteers;
- Lack of motivation and confidence in the RC Branch.

What did they do to overcome the challenges?

- Leadership and management recognized the issues, did not try to cover it up and keen to take action;
- Approaching the community to involve them in the solution, being honest with them and open to listening to them;
- Putting **'community based volunteer system'** as their key action;
- Identifying services and activities which are sustainable and relevant as it meets the community needs and is within the RC mandate and attracting attention of volunteers;
- Able to see the important role of volunteers to support service delivery and also be ambassadors for the RC.

What are the lessons that we could learn from the Cabo RC RC Branch?

- Essential services rendered at community level which are relevant and embedded;
- Sustainable and locally resourced services;
- Visibility and image is important to build trust and credibility;
- Can have simple but effective support structures;
- Volunteers who come from the local community provide access and also acceptance;
- It is important to build on what already exists rather than bring in external models, resources etc.

Document available for download from CD.

Bocolo Branch Case Study & Summary Guide

Focus for facilitators: this case study is about developing capacity of leadership and sustainability of branches.

The Bocolo RC Branch case study

For many years, the Bocolo RC branch has been weak for a variety of reasons. Eventually the branch manager was forced to resign. The National Society HQ designated one competent staff from the national headquarters to serve as the interim head of the Branch to revive the "sleeping" situation of the branch.

The new head of the branch was very concerned with the weak performance of the branch and conducted an intensive study of the branch situation. This involved a review of the branch constitution and interviewing/consulting staff, volunteers and other stakeholders and partners. He identified the following problems: weak governance, limited compliance to the branch constitution - irregular meeting of board members; no branch assemblies held for several years; lack of active, trained volunteers; service delivery which is not planned or properly resourced which stops and starts in different communities; poor Red Cross youth program especially in schools and universities; a lack of fundraising which resulted in low branch income.

Actions taken

He organized a branch assembly and briefed about the current situation of the branch and called an election in accordance with the RC constitution where new board members were elected. He oriented the new board about the Movement, the NS, its constitution and services, NS policies and finally, the branch governance functions and responsibilities. In accordance with the constitution, the board, led by its chairman, created the different committees who met regularly and followed through on recommendations at regular board meetings. The branch manager took this opportunity to develop the capacity of the board and committee members and increase their motivation.

With the new governance in place, including greater youth representation, the Bocolo RC branch staff developed their plans of action.

Over the following 18 months, **services increased and improved** with first aid trainings, conducted mostly in schools and universities. With more volunteers recruited and trained (including on the Fundamental Principles), response to disasters and other emergencies was faster, better organized and more effective enabling the branch to help more people. The blood services also improved with the recruitment of more volunteer blood donors, especially from the youth sector. The branch was able to get in-kind support from local government units after the branch presented evidence of their impact (through better reporting and monitoring) to saving lives through provision of safe blood.

When drought hit the province, only the Red Cross was allowed to conduct relief and medical operations due to election restrictions at the time. Both activities continued smoothly without any political interference. This improved NS and branch **credibility and visibility** and also increased interest from media and some corporate donors. The branch made the most of this through launching a fundraising campaign and publishing their annual report and distributing the newsletter.

Annex 11b

Bocolo Branch Case Study & Summary Guide

Bocolo Branch Case Study Summary Guide

What were the problems/challenges faced by Bocolo branch and the community?

- Non-functioning board and weak management;
- Lack of leadership support from NS to Branch;
- Small number of volunteers;
- Low involvement of youth in the branch;
- Limited financial resources in cash and in kind;
- Inadequate service delivery through lack of planning, budgeting;
- Potential for conflict with communities because of sudden termination of activities;
- Lack of clear direction and presence of the branch as activities are opportunistic.

What did they do to overcome challenges?

- NS management support to branch;
- Induction of the branch board to enhance understanding of their roles and responsibilities and expectations from the constitution;
- Committed board and management with a clear analysis of the situation;
- Focusing on the mandate of RC to support the most vulnerable in the community;
- Identification of key activities and services with a continuous motivation;
- Support, training (including on FPs) and deployment of volunteers;
- Increasing profile of branch to support fundraising efforts.

What are the lessons we could learn from the Bocolo RC branch?

- Importance of (internal/external) analysis to identify the key issues;
- Need leadership buy in to drive through change processes;
- Leadership capacity building is equally important to sustain the branch;
- Strong visibility and image is key to improving fund-raising efforts;
- Strong volunteer base focused on key services and activities should be a priority;
- Need for training in FPs to ensure impartial and neutral action;
- Look to local sources for mobilizing resources – financial, material or in-kind;
- Monitoring the change we are making and being able to demonstrate this is an important part of showing we are accountable and effective.

Zimby Branch Case Study and Summary Guide

Focus for facilitators: this case study is about branch management, ownership and communication and having services relevant to community needs.

The Zimby Branch Case

The Zimby Red Crescent branch is in the district town of Zimby. Most people outside Zimby live outside of the town. A Ministry of Health needs assessment identified that primary health care is a major issue in the district, as is water and sanitation. There is also a growing incidence of HIV. Some areas are particularly vulnerable to mudslides and others to flooding along the main river.

In Zimby town, the Branch volunteers clean up the market square in return for donations from traders which they used to support host families to feed local orphans.

Outside of Zimby town, the branch carried out water, sanitation and hygiene (WASH) activities with the support of the national HQ, on behalf of an international donor. This project provided per diem (more than daily average wage) to volunteers; vehicle and salary for a branch WASH project coordinator position. There were no other ongoing activities in the district beyond these WASH activities, except responding to small scale disasters such as floods and mudslide. The image of the Red Crescent in the district was of a well-funded organization.

A disagreement arose between the Zimby RC branch committee and the Red Crescent National HQ when the international donor told the HQ that it could not guarantee future funding from its back donor if the number of target beneficiaries were not increased. HQ suggested to install more hand pumps to increase the total number of beneficiaries to meet the expectation of the back donor. The HQ did not want to lose an important donor, and therefore instructed the branch to act accordingly.

The Zimby RC branch committee did not agree because they wanted the WASH project coordinator to support other branch activities rather than focus and devoting all his time and resources on WASH project, even though fully paid by the donor. The volunteers on the WASH project were also concerned they would no longer be paid their per diems.

The Zimby branch discussed with HQ that an effective WASH project should not prioritize construction over operation, maintenance and hygiene education. The branch also explained that the inclusion of the local communities in re-directing and implementing the WASH project would be the key to its success, with local volunteers providing the support network. This approach was agreed by all.

In support of the new approach, some of the former project volunteers offered to support and train the chosen leaders of community volunteers in their tasks. The WASH Project coordinator worked closely with the Zimby branch and some active volunteers providing on-the-job training to transfer her project management and reporting expertise.

The Zimby RC branch met with local community leaders and agreed to work together and built on the solidarity and enthusiasm of the community in identifying their priority needs, mapping out plans of action and tapping local resources for the implementation and sustenance of its services. They shared knowledge and combined resources with local authorities, women groups, community-based organizations, and other possible partners. The Zimby RC branch also established closer links with peer branches to learn from their successes and mistakes, and reinforced the local committee responsible for resource mobilization.

Finally, the Zimby branch also felt their role and responsibilities in times of disasters should become more significant and was now becoming well connected with vulnerable communities (and their volunteers), which was recognised by different stakeholders. They began to assist with the development and support of the local disaster-risk reduction plans.

This approach required an adjustment of the present way of working: instead of undertaking few ad-hoc branch activities, soliciting external partner support, relying on technical expertise from HQ and deploying volunteers to the project sites, the focus shifted to working directly and closely with community groups and volunteers, seeking partnerships with other stakeholders, identifying local resources, and providing essential support which could be sustained over time.

Annex 11c

Zimby Branch Case Study and Summary Guide

Zimby Case Study Summary Guide

What were the problems/challenges faced by Zimby branch and the community?
- Externally funded projects and donor-driven attitude;
- Lack of good communication between HQ and Branch;
- An image of being a rich organization;
- Few relevant services;
- Weak connection with the community;
- Weak local volunteer network;

What did they do to overcome challenges?
- Using the (incidental) external project support to strengthen the local branch capacity;
- Reflection on the role of RC branch on providing relevant services for vulnerable people;
- Reflection on local capacity and opportunities to link, grow and learn;
- Understanding the benefits to engage with local communities and their members;
- Leadership taking initiative and embarking on new direction, involving volunteers and reaching out to different stakeholders, e.g. local government, business persons, community based organisations.

What are the lessons that we could learn from the Zimby RC branch?
- Working closely with active local community volunteers;
- Partnership with local stakeholders;
- Addressing priority needs of the community and using local resources;
- Strengthening core activities: hygiene education & health promotion; train for maintenance of WASH facilities; supporting the function of health committees;
- Organizing and training local disaster response groups;
- Establishing the image of the RC as a relevant humanitarian partner.

BOCA Reporting Template

Logo of the NS

Branch Organizational Capacity Assessment (BOCA) Report

Branch name

Picture

<district >, <date>
Venue/date:
Lead Facilitator:
Co-Facilitators:

Annex 12

BOCA Reporting Template

Contents

International Federation of Red Cross and Red Crescent Societies
Branch Organisational Capacity Assessment (BOCA) | Annexes

Annex
12

BOCA Reporting Template

1. List of Participants

No	Name	Designation	Signature	
01			Date	Date
02				
03				
04				
05				
06				
07				
08				
09				
10				
11				
12				
13				
14				
15				

2. Branch Self-Assessment

INDICATOR	Final rating	Priority votes	Ranking
Core capacity: TO EXIST			
1. Seven Fundamental Principles the RCRC Movement			
2. Emblem			
3. Membership base			
4. Branch General Assembly			
5. Branch Governing Board			
6. Branch Planning			
7. Autonomy			
Core capacity: TO ORGANIZE			
8. Safety and Security			
9. Staff Management			
10. Volunteer recruitment			
11. Volunteer recognition and retention			
12. Volunteer records			

Annex 12

BOCA Reporting Template

2. Branch Self-Assessment

13. Youth engagement			
14. Diversity			
15. Infrastructure			
16. Financial Management			
17. Budgeting and cost efficiency			
18. Financial information system and reporting			
19. Records management			
20. Logistics			
21. Activity identification			
22. Planning, monitoring and evaluation			
23. Reporting			
Core capacity: TO RELATE AND TO MOBILIZE			
24. Information sharing and decision making			
25. External coordination			
26. External communication and humanitarian diplomacy			
27. Community involvement			
28. Diversity in Resource Mobilization			
29. RC network at grass root level			
Core capacity: TO PERFORM			
30. Sustainability of activities			
31. Adapting to differing needs and priorities			
Core Capacity: TO GROW			
32. Learning and adaptation			
33. Conflict resolution			
34. Support to NS growth			

Scoring and Prioritization at a glance

Topics below benchmark	
Topics above benchmark	
No. of topics prioritized by the Unit	
No. of topics got no priority votes	

*** *You may insert a column or bar graph here to show the highlights of final scoring of matrix.*

Document available for download from CD.

BOCA Reporting Template

3. Branch Context

(i) Branch information sheet – Annex 7a
<this is based on filled out Annex 7a from the branch>

1	Date of completing the form		
Basic information			
2	Branch name		
3	Postal address		
4	Email address (Head of branch)		
5	Telephone number of Office		
6	Date of establishment		
Context information			
7	Constituency name		
8	Population number and breakdown of Gender and Age if possible		
9	Main humanitarian challenges (include who are the vulnerable groups)		
10	Other humanitarian agencies		
Branch information			
11	Number and position of paid staff		
12	Branch manager name		
13	Number of active volunteers	Male:	Female:
14	Total number of volunteers	Male:	Female:
15	Number of paying members	Male:	Female:
16	Date of last general assembly		
17	Main RC (internal and external) supporting partners		
18	Do you have a current annual operational plan?	Yes / No	
19	Do you have a current annual report?	Yes / No	
20	Number of beneficiaries receiving support (for last year)	Male:	Female:

(ii) Branch Activity and Financial context –Annex 7b
<this is based on filled out Annex 7b from the branch>

Section A				Budget (in local currency)			
A.	**Programs**	**status**	**target group**	**donor**	**Last year**	**This year**	**Next year**

Annex 12

BOCA Reporting Template

Section B			Budget		
B.	**Admin cost**	**donor**	**Last year**	**This year**	**Next year**
1	salary Branch Mgr.				
2	salary 2 guards				
3	office utilities				
4	General Assembly				
5	vehicle maintenance				
6	communication				
7	networking				
8	Focal person salary				
9	finance staff salary				

Section C			Budget		
C.	**Branch Development**	**item**	**donor**	**Last year**	**This year**	**Next year**
1					
2					
3					

		Budget		
	Integrated Expenditure budget	**Last year**	**This year**	**Next year**
A	Programs			
B	Administrative costs			
C	Branch development costs			
	Total Expenditure			

Section D			Budget		
D.	**Income**	**from**	**Last year**	**This year**	**Next year**
1.	Life Member fee				
2.	Advance Rent				
3.	Donation				
4.	Rent Collection				
5.	Received From NHQ	Co-curriculum Activities			
6.	Lone from Secretary				
		Total Income			
Balance Income – Expenditure		Total			

(ii) Branch Activity and Financial context – Annex 7b
<this is based on filled out Annex 7b from the branch>

Ref #	Item	QTY	Type	Condition (new, good working condition, used, damaged, not working)	Location	Serial # (if available)	Person Assigned if applicable

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Annex
12

BOCA Reporting Template

4. Branch Action Plan

<branch action plan should integrate regular activity and service delivery of the branches together with the priority activity for capacity building of branches from BOCA exercise>

Annex 15a

Themes	Activity	Annual Target	Responsible Person	01	02	03	04	Resources	Sources	Service delivery
Theme 1										
Theme 2										
Ongoing Activities										

Page 7 of 8

Annex 12

BOCA Reporting Template

5. Next Step

6. Photo Gallery (optional)

Report Distribution:

2 copies, signed off by branch assessment team at page 2

- 1 HQ

- 1 Planning and Development / OD Department

Document available for download from CD.

BOCA Certificate for branches sample

Cabo Red Cross Society LOGO

Certificate

This is to certify that

BOCOLO Branch of Cabo Red Cross Society

has successfully conducted the

Branch Organizational Capacity Assessment (BOCA)

On

January 22nd – 23rd, 2016

at

Kuala Lumpur City

Awarded on this 23rd day of January 2016

Adith DURJOY
Secretary General
Cabo Red Cross Society

Sayed AHMAD
National Chairman
Cabo Red Cross Society

International Federation
of Red Cross and Red Crescent Societies
www.ifrc.org Saving lives, changing minds.

Annex 13b

BOCA Certificate for Facilitators

Certificate

This is to certify that

Alex Torres

has successfully completed the

Branch Organization Capacity Assessment (BOCA) Facilitators' Training

held on

at

This Training Covered
- Understanding the BOCA and its uses
- Understanding the BOCA facilitator's guide
- Understanding the BOCA tools
- Preparing a BOCA exercise in a branch
- Practicing how to facilitate a BOCA assessment
- Responsibility of a BOCA Facilitator
- Roles of a BOCA lead Facilitator
- Preparing a BOCA report
- Actual conducts of BOCA facilitation in a branch.

ABCDEF
Secretary General
XXX Red Crescent / Cross

FEDCBA
Volunteering Developing and OD Delegate
International Federation of Red Cross and Red Crescent Society
Asia Pacific Zone Office

Document available for download from CD.

Annex 14a

Template for internal progress tracking of BOCA PoA by branch

<Use excel for this progress tracking template. Branch itself can use this template for their internal purpose to track progress of implementation of their BOCA plan of action.>

Name of Branch:

Period of report:

SL	Themes	Activity	Annual Target	Quarterly Progress				Cumulative progress	Number of people reached (if any)		
				01	02	03	04		Male	Female	Total

Document available for download from CD.

Monthly or Quarterly Activity Reporting Template

Annex 14b

<This template can be used for monthly or quarterly reporting, whichever is applicable, submitted to the upper level of branch.>

1. Basic Information

Name of Branch		Reporting Month	

2. Progress of the Planned Activities

Sl. No	Name of activity	Description of the activity	Status		Result	If variance occurred, mentioned the reason	Number of people reached (if applicable)		
			Target	Achievement			Male	Female	Total
01	<Mention the activity as per project Plan of Action or Departmental 4-Year Plan>	<Mention the objective of conducting this activity, type of participant (BDRCS, IFRC, Local Govt. representatives, Government, NGO or INGO representatives), place of conducting the activity and collaboration)	Put the numeric figure as per plan	Say what has been achieved.	This part will focus on the result of the accomplished activity. For instance, the result statement of recently accomplished 'First Aid' training can be: • Participants now have practical understanding/ knowledge on basic first aid • They are able to deliver first aid services as and when needed	If your achievement is below than target, kindly mention the reason why that happened.			
02									

3. Challenge faced and measures taken to overcome

Challenge (if applicable)
1.
2.

Action taken of overcome (if applicable)
1.
2.

Report prepared by _____

Date of submission _____

Template for database of NS to track overall progress of BOCA PoA of all branches

<Use excel for this database. HQ or provincial/state level BOCA focal should be the person to manage this database. Should be updated at least once in every 6 months. All the branches data should be captured here. Data can be managed according to division/provinces>

Period of Data:

Date of last update:

SL	Themes	Activity	Annual Target	Completed	Percentage (%)	Community Coverage (if any)			Remarks (if any significant issue is there to mention)
						Male	Female	Total	
<X Branch>									
<Y Branch>									
<Z Branch>									

Document available for download from CD.

Annex 15a

Priority Activity Planining (Branch PoA) – Template

<branch action plan should integrate with the regular activity and service delivery of the branch together with the priority activity for capacity building of branches from BOCA exercise>

Themes	Activity	Annual Target	Responsible Person	01	02	03	04	Resources	Sources	Service delivery
Themes 1										
Themes 2										
Ongoing Activities										

Note: The activity plan should be linked to Annex 7b/1 in order to reflect the above activities under Section B, C or D where budget and resource mobilization planning is taken into account for the year or the following year.

See examples in Annexes 15b and 7b/1.

Document available for download from CD.

Annex 15b

Example of Priority Activity Plan (Branch PoA)

Themes	Activity	Annual Target	Responsible Person	01	02	03	04	Resources	Sources	Service delivery
Dissemination of RCRC knowledge and princeples	Orientation on 7 principles for Executive Committee, Volunteers and Staff	3	Branch Officer					Resource persons from NHQ & $1,200	Branch	X
	Emblem campaign	4	Branch Officer					IEC Material from NHQ & $800	Branch/ Local donor	X
	Meeting with local administration to disseminate RCRC Principles	1	Branch Manager					$ 500	Branch/ Local Admin	X
Volunteer development and management	Establish volunteer recognition and awarding system	1	Volunteer Chief					$ 500	Branch fund	**X**

Note: The activity plan should be linked to Annex 7b in order to reflect the above activities under Section B, C or D where budget and resource mobilization planning is taken into account for the year or the following year.

See examples in Annexes 15b and 7b/1.

Document available for download from CD.

BOCA Introductory Slides (ToF)

Note to Facilitators: Facilitators may require to make adjustment or adaptation to these presentation slides specific to the context of the National Society they are facilitating.

These powerpoint slides can be downloaded from the CD in this toolkit.

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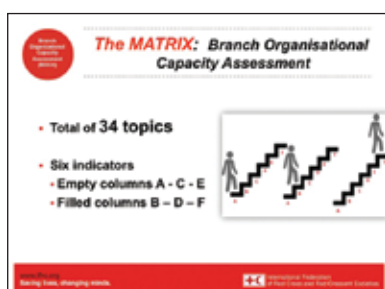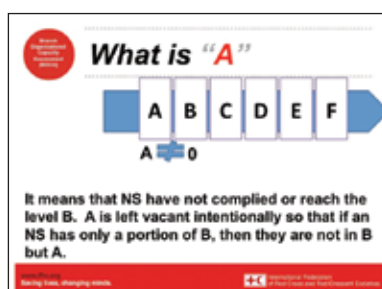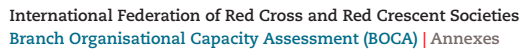
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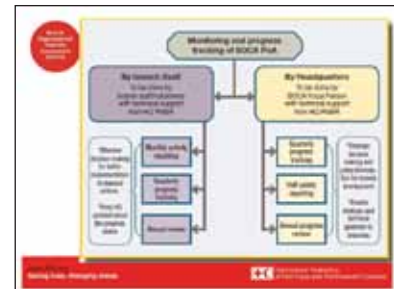
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**Annex
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Session Guide – Branch Development Game

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Session Guide – Branch Development Game

Session Guide: Branch Development Game

Time	1-1½ hours. (MAKE ADJUSTMENTS AS NECESSARY. This timing is just for guidance.)
Learning Objective	• To encourage and stimulate the discussion and enhance understanding of the issues surrounding branch development.
Expected Results	• Participants are relaxed and therefore open to talk about realistic implementation of strategies, planning and programmes in non-threatening way.

Suggested outline

Time	Content and Process	Materials needed
12 minutes	**BEFORE THE GAME STARTS** **1) Introduction of the game** • Randomly divide the participants into groups (3 to at most 6 in each group) and ask each group to sit together in one table and choose their branch name. • Explain the contents of the game sets and the game rules	3 – 4 sets Branch Development Game
30 minutes	**DURING THE GAME** **2) Start the game** • 10 rolls of dice per branch • Take note of observations	• Camera
15 minutes	**WHEN THE GAME IS OVER** **3) Concluding Session** • Plenary Discussion • How did you build your branch?	• Camera
3 minutes	**4) Wrapping up the session by consolidating the lessons learned in the game.**	
General Guidance	• The game material has been tested with different people. The most significant part of the session is the conclusion/ discussion at the end. In order to successfully conduct such session, the facilitator should take extensive notes of his/her observations on how each team player and how each team worked together to build their branch. This usually covers issues on active participation, developing consensus, financial management, branch leadership, forecasting needs, program integration, Red Cross/Crescent image. Team players' attitude and points on how they build their branch is also a good starting point for discussion. • Participatory approach is advised. Participants will be asked to take part in discussing and sharing experiences & information with the group members. The atmosphere should be lively and enjoyable in general.	
Key learning points	• There are different ways of developing a branch. • Prioritization of branch needs considering the limited resources a branch has. • A branch exists to deliver services to the most vulnerable. If it cannot do so, it is not fulfilling its mandate. • The development of a branch must be geared towards enhancing its capacities, facilities and services. This might be at different levels of development but the basic idea is to balance the development of these three areas simultaneously.	

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Session Guide – Branch Development Game

DETAILED FACILITATION GUIDE

Procedure	Description / Method	Material	Time	Remark
BEFORE THE GAME STARTS				
A: Introduction Objectives, Purpose, General overview & Grouping	**1) Small talk** - Greetings and welcoming participants to the session. - Explain the purpose of the game		2 min	
	2) General overview - Brief participants on what is going to happen, how long the game will last, expectations and participation from participants.			
	➢ **Say:** *"We are going to play a game called Branch Development Game. It will take approximately 30 minutes and another 30 minutes for discussions. In this game, each team will be tasked to establish a very well functioning Red Cross branch. It will be totally dependent to the teams how their branch will look like at the end of the game"*			
	- Divide participants in groups. Each one has 3-6 members depending on number of participants. (see tip on grouping in remark column)		1 min	**Tips for Grouping:** Ask participants to stand in line according to the order of their birthday. No words allowed. It should be quick and fun. Facilitator(s) check and rearrange the right order if needed. THEN, ask participants count 1 to whatever number of groups wanted. For example, if you expect 3 groups, you have participants count 1 to 3. Then, participants gather in group number they have counted.
	- Inform them that the groups have to present what they have built up through the game afterward and the current situation of the branch. - Also inform them that you will share your observations on how they were playing the game at the end of the group presentation.		1 min	

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B: Content	3) Content of material kit - Explain the game board features in detail but not the rule of the game. The materials from the package should be displayed along with the explanation.	A sample of game set	3 min	
	Outside cover of board game: ➢ Say: - *This is how the game looks like. (show the game board.)* - *If you turn to the other side, you will see the inside cover. On one side, you see game title and its background. (Show the page with photo of game players.)* - *On another side, you see the rules of the game, which we shall discuss in details later.* **Inside cover of board game:** ➢ Say: - *When you open it, you will see the game board right in the middle. There, you have different columns in 3 categories: Facilities, Capacities and Services. Those categories are well color colored in blue, green and pink.* - *In relation to the categories, you see investments with their price lists. The colors correspond to the cells on the game board. You see these investment lists in separate paper as well to assist you in your decision making.* - *There is also a set of cards listing the stakeholders in your branch. There are about 12 choices.* - *You have other game accessories; e.g., 2 dice, plastic coins (blue and red), investment cards and yellow chance cards in plastic pockets.*			
C: Game Instructions & Rules	4) Instructions ➢ Say: - *Now, let me tell you how we play the game.* - *But before that, please name your branch.* - *Please designate one person in your team to be a treasurer. The treasurer can also play the game.* - *Each one of you choose your role in the branch by getting one stakeholder card and place it in front of you.* - *Remember the main objective is to build up your branch. You start from nothing in the branch.*		5 min	

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Session Guide – Branch Development Game

5) **Rules**
➤ **Say:**
- *Each member has at least 2 times to roll the dice. (**This number can be adjusted depending on the available time and players. Each group can only have 10 dice rolls**)*
- *Select the person to start the game. S/he throws the 2 dice on the table. Count the number of dots on the face of the dice.*
- *Each roll of the sets of dice earns money. For example, if after rolling, the first dice has 3 points and the other dice has 3 points, you gather a total of 6 points (referring to the 6 dots on the dice). Each point is equivalent to 1,000 Dunants. In this case, you therefore earn a total of 6,000 Dunants. **Please remember that the value of one blue coin is 1,000 Dunants.***
- *After each roll, immediately discuss what to do with the funds gained. The person who threw the dice will suggest first. All decisions should be a consensus.*
- *If the group decided to invest, give payment to the banker. The banker will exchange with the investment coupon*
- *The next person clockwise will throw*
- *During the first half of the game, if the dices are thrown with the same points (ie a double pair, e.g. 1,1; 2,2; 3,3; etc) take one chance card (yellow color) with question mark and do what is written there. It can be positive or negative. You still earn your Dunants for the value of the dots.*
- *If you think that you have invested for something that will generate income, you place a red chip on top of the card. That will indicate that you are receiving an income. (Give an example of income generating asset i.e. fundraising shop, one floor of your branch office for rent can generate income)*

6) **Challenge**
➤ Say:
- *AT EXACTLY HALFWAY THROUGH THE GAME, ON THE 6TH THROW, ONE DICE IS SURRENDERED TO THE FACILITATOR.*
- *From the 6th up to the 10th throw, every time the dice rolls odd number*

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	(1,3,5), the branch picks up a yellow chance card and do what is asked in that card. *Reminder: Don't forget to offer a possibility for participants to ask questions.*			
DURING THE GAME				
D: Game Commences, Observation & Mediation	**7) Play time** - Participants take time to play, discuss and agree amongst their group members.	A note book and a pen	30 min	
	8) Observation & Mediation - Facilitator(s) go around and observe different groups on their discussion, performances, attitude and group dynamic. - Assist in mediating and facilitating discussions if needed. - Ask some key questions regarding participants' choices while challenging on decisions that have been made. - Taking a good note on outstanding points. Make sure to write excellent points or statements made by branch members. This will help Facilitator(s) to remember and make himself/herself short and clear when giving feedback.			
WHEN THE GAME IS OVER				
E: Conclusion Group Presentation, Feedback & Closing	**9) Feedback session/Branch presentation** - Ask each team to present their branch - Branch presenters bring their own boards in front to show to everyone. A designated person from the group will report on their final branch status: how they have come up with such branch, any special attention or challenge they face in their team. *(see Tips on giving feedback in remark column)* - Remember that this is the most significant part for the whole activity. If you have well observed how participants work within their groups; e.g., consensus is made, etc., you should be able to provide relevant comments and share information at the end. - A golden rule is that your observation shall focus on the game not the person. Particular names should not be mentioned in the feedback session.		15 min The time limit (3-5 min) should be announced for each presentation. Otherwise, each group will take long time.	**Tips for giving feedback:** **1) Presenter Group:** The designated person from the group presents their branch. Other team members may add their views. Make this short. **2) Other Teams:** Allow opportunities for others to exchange their experiences or ask questions. Points mentioned need not to be repeated. **3) Facilitator(s):** This should come last. Try to emphasize on points: - not well covered, - reality of the game compared to their branch,

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Session Guide – Branch Development Game

	- The conclusion should touch upon real practices in the branch. - Specific issues i.e. finance development; volunteer management etc can be focused and discussed more after general discussion (depending on content of training).		- Challenge groups who have limited capacity or programmes - Highlight implications of investments made especially on accountability, transparency, ownership, sustainability. - Lead a discussion on sustainability and long-term approach - links of discussions / decisions with RC policies and plans, - move on to next group. Take special attention to absence or presence especially of investments relating to governance, volunteering, youth, and networking. At start of the game, as all teams for their income expense statement and with this open the discussions on the issue of transparency and accountability
	7) Closing - Thank participants for their time and contributions. - Ask for comments and suggestions about the game	3 min	

Facilitators Guidance

You know that you are getting successful in this exercise when:
- Everybody is participating;
- The participants themselves raise various issues surrounding branch development.

Ideas for Energizers

In case people get tired, you can do an energizer exercise. The following are some examples:

• Elephant, cloud and tree exercises – 10 minutes

How to do it

Stand in a circle, if possible outside. One person stands in the middle. He/she points at one person and says one of the three words: Cloud, elephant or tree. The person pointed at has to make the symbol of the word mentioned:

- For an elephant is an arm to the front to symbolize its snout;
- For a cloud is hands holding each other above the head with;
- For a tree is both arms up above the head aiming for the sky.

The people on both sides should fulfill the symbol:

- For the elephant, form with both hands an open space towards the person to symbolize the ears of the elephant;
- For the cloud, stick the arm through the person's arm;
- For the tree, point with long arms away from the person to symbolize branches of the tree.

If all people do it right the person in the middle does the same again to another person, mentioning one of the three words, each time a bit faster. This continues until someone makes a mistake. This person takes over the role of the person in the middle of the circle and starts the exercise again.

• Stretching – 4 minutes5 minutes

How to do it

People stand in a circle, preferably outside. One person leads and shows different stretches of the body (stretching the arms very high up, to the back, spread out sideways and move slightly backwards, go down to the ground, etc.).

• 'Writing letters' with the body movement – 2 minutes m

How to do it

Stand in a circle, preferably outside. One person leads and explains the exercise of 'writing the letters' of the country or Red Cross / Red Crescent with the movement of the body. First start with the letter R – move your body such that it writes the letter R then on to letter E, etc

• Others

You may also ask participants to lead energizers at any point during the sessions.

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Ideas for Recap Exercise

Here are some of the ideas to have a participatory recap at the beginning of day-2:

- Ask all the participants to take a piece of paper and write at least one or maximum two things about day 1. They may write something that they have done for the first time or anything they are unsure about, or they found interesting, something positive or negative;
- Give them 2-5 minutes;
- Ensure all of them have written something;
- Once writing is done take them to an open space and ask them to stand in a circle;
- After making the circle, ask them to crumble the piece of paper into a small ball;
- Now ask them to throw the paper ball to anyone on the opposite side to catch and re-throw;
- Ask them to keep throwing the paper balls that they receive from others as if nobody wants to keep the balls in their hand;
- Stop it after one minute of throwing among each other, everybody should have a paper ball in his/her hand;
- Now, ask one by one to each open the twisted paper and readout what is written on the paper;
- Ask others if they have something to add with that or have something similar;
- Do this until all papers have been read out aloud.

Storyboard

- Split participants into groups.
- Give each group a piece of flipchart and some coloured markers.
- Give each group a major subject from the previous day(s) and get them to draw their learning points (no words allowed). Allowed for 5 minutes
- Have each group present the pictures to describe their learning points
- This review of the previous day learning, is fun and gets the right brain working.

Reflect: Participants can work alone or in pairs/trios to reflect on the following questions, and then return to the large group to share answers to example questions:

- What was particularly useful yesterday? Why?
- What is unclear from yesterday?
- Having "slept" on it all, what new insights do they have about yesterday's work?

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Branch Organisational Capacity Assessment (BOCA) Matrix

SL	Topic	A	B	C	D	E	F	Consensus Score	Priority Votes	Rank
1	Seven Fundamental Principles the RCRC Movement									
2	Emblem									
3	Membership base									
4	Branch General Assembly									
5	Branch Governing Board									
6	Branch Planning									
7	Autonomy									
8	Safety and Security									
9	Staff Management									
10	Volunteer recruitment									
11	Volunteer recognition and retention									
12	Volunteer records									
13	Youth engagement									
14	Diversity									
15	Infrastructure									
16	Financial Management									
17	Budgeting and cost efficiency									
18	Financial information system and reporting									
19	Records management									
20	Logistics									
21	Activity identification									
22	Planning, monitoring and evaluation									
23	Reporting									
24	Information sharing and decision making									
25	External coordination									
26	External communication and humanitarian diplomacy									
27	Community involvement									
28	Diversity in Resource Mobilization									
29	RC network at grass root level									
30	Sustainability of activities									
31	Adapting to differing needs and priorities									
32	Learning and adaptation									
33	Conflict resolution									
34	Support to NS growth									

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Sample of BOCA topic cards

For Printing Detachable Topics for Prioritization 2 Session

1	**Seven fundamental principles**	**2**	**Emblem usage**
3	**Membership base**	**4**	**Branch General Assembly (GA)**
5	**Branch Governing Board**	**5**	**Branch Planning**
7	**Autonomy**	**8**	**Safety and security**
9	**Staff management**	**10**	**Volunteer recruitment**
11	**Volunteer recognition and retention**	**12**	**Volunteer records**
13	**Youth Engagement**	**14**	**Diversity**
15	**Infrastructure**	**16**	**Financial Management**
17	**Budgeting and cost efficiency**	**18**	**Financial information system and reporting**
19	**Records management**	**20**	**Logistics**
21	**Activity identification**	**22**	**Planning and Monitoring**
23	**Reporting**	**24**	**Information sharing and decision making**

Document available for download from CD.

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Sample of BOCA topic cards

25	External coordination	26	External communication and humanitarian diplomacy
27	**Community involvement**	**28**	**Diversity in Resource Mobilisation**
29	**RC network at grass root level**	**30**	**Sustainability of activities**
31	**Adapting to different needs and priorities**	**32**	**Learning and adaptation**
33	**Conflict resolution**	**34**	**Support to NS growth**

Note: These cards / strips of paper (½ of A4 on landscape) can be laminated for durability
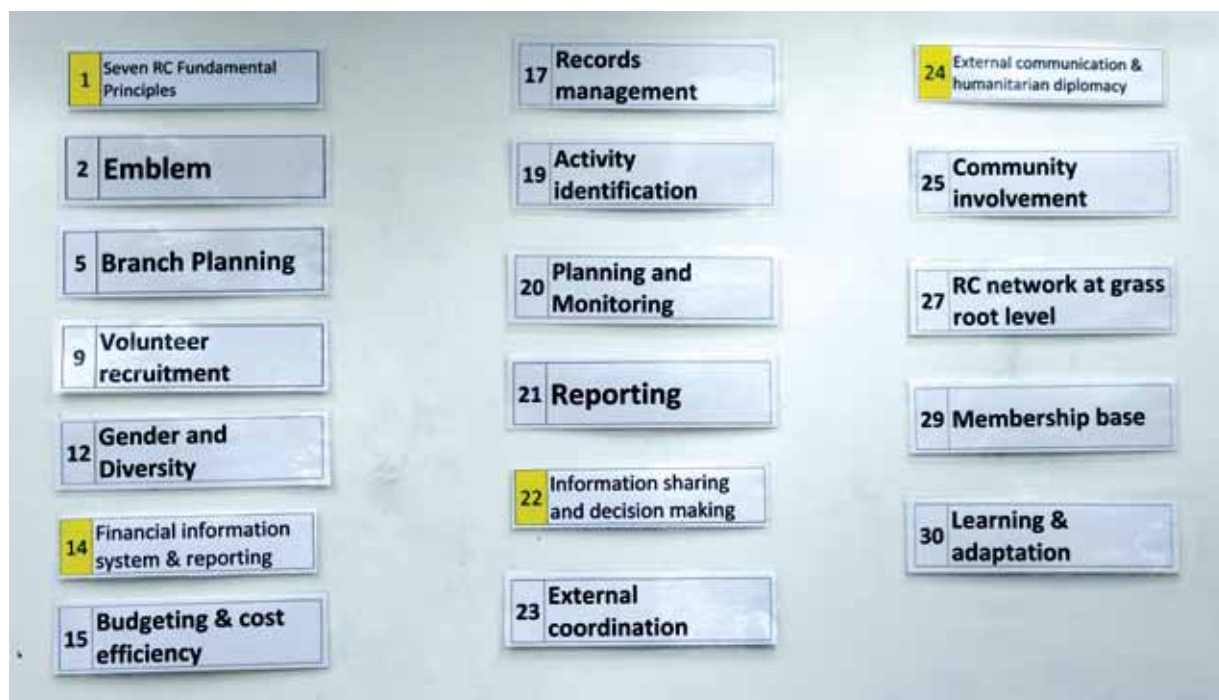
Example of laminated Topic cards

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Terms of Reference for BOCA Analysis

BOCA Analysis Workshop

National Society Name
Date

Introduction
Summary of BOCA implementation (maximum five sentences)

Purpose of the Workshop
1. Consolidate, review and analyse the results of the BOCA exercises conducted in the branches of a National Society.
2. To upgrade the NS Branch Development Model/Framework based on the findings of the BOCA.

Participants
1. Selected BOCA Facilitators (10-15)
2. At least 2 representatives from key HQ offices.
3. Head of OD

Facilitators
To be selected in consultation with BOCAC Hub. Contact Mr Shahinur Rahman, Lead-Analysis, BOCAC Hub at shahinur.rahman@bdrcs.org cc to the BOCAC Hub Team Leader Mr Matiur Rahman (*matiur.rahman@bdrcs.org*), BOCAC Hub Co-Team Leader Ms Puje (*purevjav.j@redcross.mn*) and Mr Adithshah Durjoy (*adithshah.durjoy@ifrc.org*).

Detailed Schedule
– *Date of arrival of facilitators to date of departure of the facilitators*
– *Arrival -departure of participants*
– *Date of analysis workshop*

Budget
1. Tentative budget along with sources of budget

Document requirement from NS:
• BOCA matrix in excel file (as per the guide)
• All BOCA reports in word file
• Branch development framework
• New Strategic Planning document

IT equipment's from NS:
• At least 4 laptops for four groups

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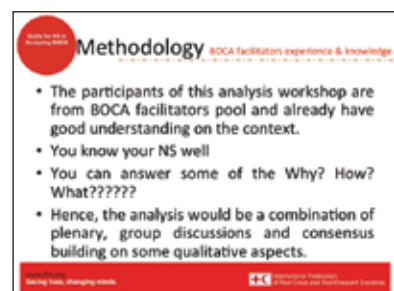Slide 18

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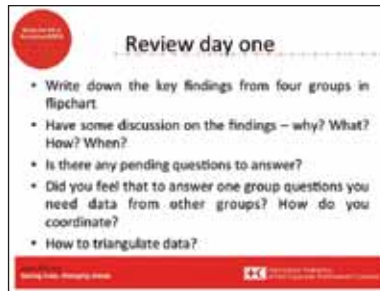Slide 43

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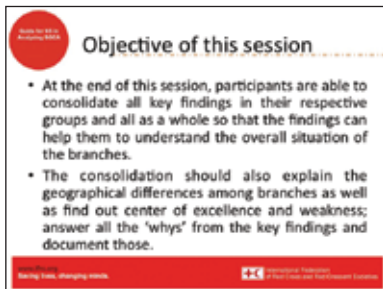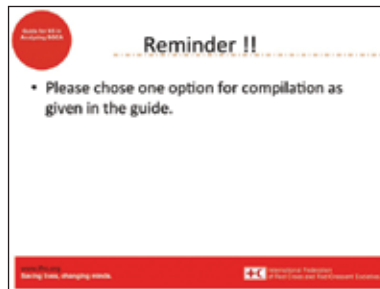# National Society Guide in conducting BOCA Analysis

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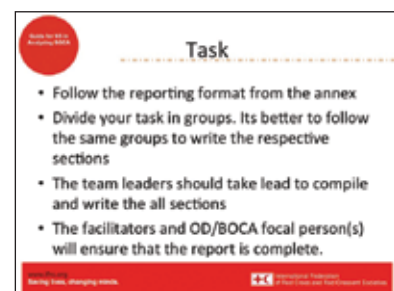**Slide 51**

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Guiding questions for analysis

Contents

1. Guiding questions for group 1: General Analysis

General Analysis guiding questions for the core capacity matrix:

- What do the BOCA topics findings tell us regarding the common strengths of our branches?
- What do the BOCA topics findings tell us regarding the common weaknesses of our branches?
- What about the strengths and weaknesses of the branches in each region?
- More specifically, what are the major and leading strengths of our branches?
- More specifically, what are the critical and super critical weakness of our branches?

Note: please follow the below instruction to identify different types of strength and weakness.

Strength	Common (more than 50%) 51 – 100%	Major (51- 80%)	Leading (more than 80%)
Weakness	Common (more than 50%) 51 – 100%	Critical (51- 80%)	Super Critical (more than 80%)

- Common strength of the branches (Common strengths are considered for those topics scored above benchmark by more than 50% of the total branches -51-100%)
- Common weakness of the branches (Common weakness are considered for those topics scored below benchmark by more than 50% of the total branches- 51-100%)
- Major strength of the branches (Major strengths are considered for those topics scored above benchmark by 51- 80% of the total branches)
- Critical weakness of the branches (Critical weakness are considered for those topics scored below benchmark by 51- 80% of the total branches)
- Leading strength of the branches (leading strengths are considered for those topics scored above benchmark by at more than 80% of the total branches)
- Super critical weakness of the branches (Super critical weakness is considered for those topics scored below benchmark by more than 80% of the total branches)
- What are the priority topics identified mostly by the branches? (ranked as 1, 2 and 3)
- Were the priority topics picked up from the critical or super critical weaknesses? Explain the NS/branch logic behind these.
- Which division/region/province need immediate capacity building support? Why and what kind of capacity building support?
- Which district branches/units/townships need immediate capacity building support? Why and what kind of capacity building support?
- Which district branches/units/townships can provide capacity building support to others? Why and what kind of capacity building support can they offer?

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Guiding questions for analysis

2. Guiding questions for group 2: Topic level specific analysis

Guiding questions:

- What is the overall Gender and Diversity consideration in capacity and program level?
  - If you use the most recent matrix, explore Topics number 3, 9,10,14,12,31; If you are using previous version of the matrix, please explore Topics number 29, 8, 9, 11. Otherwise, review carefully your own NS' BOCA matrix
  - what is the baseline from branch basic information sheet?
  - What is the target consideration from the next year PoA?
- Which **t**opics are given more priority by the branches? What are the reasons for these?
- What is the status of the safety and security of staff and volunteer of the branches? Are the findings compatible with OCAC?
- Being a volunteer based organization, are the branches giving attention to volunteer recognition and retention? Give two examples for your answer.
- What is the status of diversity in resource mobilization? Try to compare with the branch income status and identify best practices for branch level income generation? Can this best practice be replicated? How and any suggestion?
- What are the reasons for general weaknesses of the identified topics?
- Were there any initiatives to overcome the weakness? If yes, how and if not, why?
- What is the general understanding of the branch management/governance on the discussed topics?

3. Guiding questions for group 3: Analysis of the Branch Information

3.1 Basic information analysis

Guiding questions

- What are the main humanitarian challenges? Identify three major challenges.
- Who are the most vulnerable groups? Why?
- What is the total number of volunteers in the assessed branches? Number of males. Number of females? Why such ratio?
- What is the active number of volunteers in the assessed branches? Number of males. Number of females? Why such ratio? Why such difference between total number of volunteers and reported active volunteers?
- What is the number of paying members? Number of males. Number of females? Why such ratio?
- Do our branches have current annual operational plan? Yes or no. What is the general cause for the such result?
- Do our branches have current annual report? Yes or no. what is the general cause for the such result?
- Number of beneficiaries receiving support (for last year)? Mention male female. Why such ratio?
- In general, is the beneficiary need identification properly done?
- What is the trend of internet use in the branches?

3.2 Branch Activity and Financial Context

Guiding questions

- What is the overall budget for last year, current year and next year of the branches? Segregate according to the state/region/province/division. (This will help management to see the overall financial requirements from the branches with trends of previous year as well as needs for immediate next year.) Why such budget? Is it justified? Is it relevant and appropriate and equitable?
- What is the overall budget under the three part of the integrated expenditure budget (program, administrative and branch development cost)? Is the proportion of the expenditure budget under

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Guiding questions for analysis

the three parts justified? Explain? (here you may explore what is justified. Is 30% admin costs justified? What is the NS policy on this issue?)

- What is the overall income for last year , current year and next year of the branches? Segregate according to the state/region/province/division. Why such income? Does it reflect into their service delivery? How much are they utilizing for their service delivery?
- What are the prospective resource mobilization/income sources of the branches? What are the good example of income generation?
- What is the general trend of income vs expenditure of the branches? for last year , current year and next year. Segregate according to the state/region/province/division.
- What is the general trend of admin cost vs programme cost of the branches? for last year , current year and next year.
- Do these financial information correlate with the topic result on financial management? Why? How? How can it be improved?
- How the financial management of the branch can be improved?

3.3 Branch Asset information
Guiding questions:
- What proportion of the branches possess the following assets?
  - Land
  - Building
  - Vehicle
- How many branches have own land? How are they utilizing those assets? List minimum five use of own land. Any suggestions for better use?
- Are the branches well equipped with IT facilities? %
  - Number of Laptop
  - Number of desktop
  - Number of printer
  - Number of photocopier
  - Internet access

Segregate according to the state/region/province/division.

- What are the general challenge of asset management? How can these be improved?

4. Guiding questions for group 4: Analysis of priority activity plan
Guiding questions
- What are the commonly identified themes from the branch PoA?
- What should be the five key themes or areas that you want to suggest NHQ to provide support to the branches?
- In general, does the PoA reflect the identified weakness? What is the common understanding of the branch people to the PoA?
- Discuss possible actions to address the themes/areas identified. What are the most suggested activities by the branches?
- Identify which department/s is/are best positioned to address the themes.
- What is the target beneficiary (in terms of service delivery) for next year?
- Do you think that the PoA will be implemented by the branches? If yes, what are the most exciting follow up mechanisms mentioned? If not, why? What are your suggestions?

Annex 25

Compilation of Recommendation from BOCA Analysis

SL #	Recommendations	Priority	Assigned responsibilities

Suggested content for the BOCA comprehensive report.

(It is suggested that this will be an evolving report. The NS OD/Branch Development Focal Person may start documenting the BOCA initiatives e.g. writeshop and simply add on as a new section other significant activities e.g. Training of Facilitators. This way, your NS will only be referring to a single BOCA report.)

Annex 27

Agenda for the 2-day BOCA Analysis Workshop

Day 1		
8:30 – 9:00	Arrival | Registration, self–introduction and opening	NS
9:00 – 09:15	**Session 1:** Introduction to BOCA and the Analysis initiatives	facilitator (s)
09:15 – 09:35	**Session 2:** NS BOCA implementation and analysis updates	By OD Focal/BOCA focal points
09:35 – 10:00	**Session 3:** Highlights from other NS BOCA Analysis	External facilitator (s) (Online?)
10:00 – 10:30	Tea/Coffee Break	
10:30 – 11:15	**Session 4:** Explaining the methodology | Group Formation	Facilitator (s) and OD focal
11:15 – 12:30	**Session 5:** Group analysis	All participants lead by group leaders
12:30 – 01:30	Lunch Break	
01:30 – 02:40	Continue analysis and problem solving (if any)	All participants
02:40 – 03:30	**Session 5a:** Presenting three key findings from each group	All participants lead by group leaders
03:30 – 04:00	Tea/Coffee Break	
04:00 – 05:30	**Session 5b:** Continue Analysis and presenting three more key findings	All participants
5:30	*Session ends (each group may decide to meet in the evening to practice and review)*	

Day 2		
8:30 – 9:00	Review Day 1	All participants and facilitator (s)
9:00 – 12:30 (*including tea break*)	**Session 6:** Consolidated all key findings: qualitative and quantitative	Group wise & Four groups together
12:30 – 1:30	Lunch Break	
01:30 – 02:30	Session 7: Agree key Recommendations from the analysis to be presented to Management	All participants lead by OD Focal
02:30 – 03:00	**Session 8:** Exploring the practical applications of BOCA Analysis findings into the NS Branch Development Framework	All participants lead by OD Focal
03:00 – 05:30 (*including tea break*)	**Session 9:** Finalizing the report	All participants and External facilitator (s)

The Fundamental Principles of the International Red Cross and Red Crescent Movement

Humanity The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.