

CAPACITY

MATRIX

Organisational self-assessment & development planning tool

ERASMUS+ | AETOI THESSALONIKIS

A practical tool for reviewing organisational capacity, identifying development needs and translating learning from the mobility into concrete follow-up actions.

8 capacity areas / 4-level scale / action-oriented review

Purpose of the Capacity Matrix

The Capacity Matrix supports a structured review of organisational strengths, gaps and development priorities following the Staff Mobility in Sofia. It is designed to help staff move from reflection to practical organisational improvement across eight interconnected capacity areas.

The tool can be completed individually or as a team. Scores should be supported by short evidence or observations, followed by a realistic development need or next action.

HOW TO USE IT

For each criterion, select a level from 1 to 4. Add evidence from current practice, note what needs strengthening, and define the next action. The matrix is intended as a development tool rather than a pass/fail assessment.

Assessment scale

1	Initial	Practice is limited, informal or not yet established.
2	Developing	Some practices exist, but they are not yet consistent or fully embedded.
3	Established	Clear and regular practices are in place and generally applied across the organisation.
4	Advanced	Practice is systematic, reviewed and continuously improved, with strong organisational ownership.

Capacity areas

Digitalisation | Accessibility | Green / Sustainability | Governance | Financial Management | Staff | Inclusion | Communication

Digitalisation

Assessment criterion	Level	Evidence / observations	Development need / next action
Digital tools are used effectively in everyday organisational work.	1 2 3 4		
Staff have the skills and confidence to use relevant digital tools.	1 2 3 4		
Digital information and files are organised, secure and easy to access.	1 2 3 4		
Digital tools support planning, participation, feedback and follow-up.	1 2 3 4		

Accessibility

Assessment criterion	Level	Evidence / observations	Development need / next action
Physical and activity environments are reviewed for accessibility.	1 2 3 4		
Information and communication are provided in accessible formats when needed.	1 2 3 4		
Activities, equipment and instructions can be adapted to individual needs.	1 2 3 4		
Accessibility considerations are included from the planning stage.	1 2 3 4		

Green / Sustainability

Assessment criterion	Level	Evidence / observations	Development need / next action
Environmental impact is considered when planning activities and mobility.	1 2 3 4		
Resources, materials and equipment are used responsibly.	1 2 3 4		
Staff and participants are encouraged to adopt sustainable practices.	1 2 3 4		
Sustainability is reflected in organisational planning and decision-making.	1 2 3 4		

Governance

Assessment criterion	Level	Evidence / observations	Development need / next action
Roles, responsibilities and decision-making processes are clear.	1 2 3 4		
Internal procedures support consistent and transparent management.	1 2 3 4		
Safeguarding, inclusion and accountability are reflected in organisational practice.	1 2 3 4		
The organisation reviews priorities and plans for long-term development.	1 2 3 4		

Financial Management

Assessment criterion	Level	Evidence / observations	Development need / next action
Budgets are planned and monitored consistently.	1 2 3 4		
Financial responsibilities and approval processes are clear.	1 2 3 4		
Project and activity costs are documented and traceable.	1 2 3 4		
Financial planning supports sustainability and future organisational development.	1 2 3 4		

Staff

Assessment criterion	Level	Evidence / observations	Development need / next action
Staff roles and responsibilities are clearly defined.	1 2 3 4		
Training and professional development needs are identified.	1 2 3 4		
Knowledge gained through mobility and training is shared within the organisation.	1 2 3 4		
Staff cooperation, wellbeing and continuity are supported.	1 2 3 4		

Inclusion

Assessment criterion	Level	Evidence / observations	Development need / next action
People with different support needs can participate meaningfully in activities.	1 2 3 4		
Individual needs and barriers are identified before and during participation.	1 2 3 4		
Staff apply inclusive and person-centred approaches in practice.	1 2 3 4		
Participants are treated with dignity, respect and equal opportunity.	1 2 3 4		

Communication

Assessment criterion	Level	Evidence / observations	Development need / next action
Internal communication between staff is clear and timely.	1 2 3 4		
Information for participants and families is understandable and accessible.	1 2 3 4		
Feedback is collected and used to improve activities.	1 2 3 4		
External communication clearly reflects the organisation's work, values and opportunities.	1 2 3 4		

Priority Development Plan

Use this page to convert the assessment into a small number of realistic organisational priorities. Focus on actions that are specific, achievable and connected to the findings in the matrix.

Capacity area	Priority action	Responsible person / team	Target date	Success indicator
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Team Reflection

What are our strongest capacity areas?

Which areas require the most immediate attention?

What learning from the Sofia mobility can we transfer directly into our organisation?

What will we review again in 3-6 months?

DEVELOPMENT CONTEXT

This Capacity Matrix was developed as a practical follow-up tool connected to the Staff Mobility in Sofia, Bulgaria 2026, supporting organisational learning, reflection and the transfer of capacity-building practices into the everyday work of Aetoi Thessalonikis.