

## FUNCTIONAL CAPABILITY ASSESSMENT

This assessment allows you to review the functional capabilities that are needed for the initial roles in setting up a Lab. The assessment is organised by role and asks you to assess to what level you currently have available resource to meet each functional capability.

### HOW TO USE THE ASSESSMENT

You can use this assessment in two ways:

1. If you may already have a single person in mind for the role and you are assessing them specifically
2. If you do not have a single person in mind, you maybe looking across your organisation. In this instance you can track in the Notes section who has the capability and to what level (*Person A = 3, Person B = 5*)

### RANKING

- 0 = you do not currently have this capability in your team
- 5 =you have someone fully capable

### NEXT STEPS

If an individual receives a rating of 3 or 4, identify what is needed to improve their capability: Do they need training? Mentoring? Do you need to outsource that capability or hire a different resource?

## PRECONDITIONS PHASE 1 AND PRIORITIZED PHASE 2 ROLES

### DELIVERY TEAM ROLES

- STRATEGIC LEAD
- PRODUCT OWNER
- PROJECT MANAGER/ SCRUM MASTER
- FINANCE LEAD
- COMMUNICATIONS LEAD
- COMMUNICATIONS SUPPORT
- CONVENING AND RECRUITMENT LEAD
- CONVENING AND RECRUITMENT SUPPORT
- STAKEHOLDER RELATIONSHIP  
MANAGEMENT COORDINATOR
- LEARNING HISTORIAN
- LEARNING DESIGNER
- LAB FACILITATOR
- PROTOTYPING TEAM COACH

### CONVENING ORGANISATION(S)

- LAB OWNER
- LAB CHAMPION
- LAB OPERATIONS LEAD
- GOVERNANCE BOARD MEMBER

STRATEGIC LEAD / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*	NOTES/ WHO HAS THIS CAPABILITY?
Ability to identify strategic needs of the Lab		
Ability to lead all aspects of strategy and planning		
Ability to influence diverse and multiple stakeholders		
Ability to create and maintain strong interpersonal relationships and successfully managing relationship building dynamics and processes		
Ability to present and communicate Social Labs approaches and practice		
Ability to lead, manage and mentor with high integrity		
Ability to inspire others		
Ability to navigate large and complex organizations, including gaining access to key executives and stakeholders		
Ability to manage multiple initiatives in an entrepreneurial environment		
Ability to articulate benefits of a Social Labs approach to complex challenges		

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)



PRODUCT OWNER / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to lead a team of up to 15 people	
Ability to understand and communicate product vision	
Ability to assess strategic vs. tactical needs of the Lab	
Ability to make decisions regarding tactical direction of the product	
Ability to be held accountable for overall product	
Ability to hold quality standards for work	
Ability to support accountability in team	
Ability to support the team to stay focused during sprints	
Ability to adapt communications as required to engage with a wide variety of stakeholders	
Ability to develop, groom and prioritize a backlog	
Ability to define user stories	
Ability to sequence and estimate stories	
Ability to provide project progress reports and updates to stakeholders	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)



PROJECT MANAGER-SCRUM MASTER / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to plan and organise projects using the agile method	
Ability to understand/articulate the relationship between Lab tasks, stories, goals and strategy	
Ability to translate higher level priorities/stories to specific time bound tasks	
Ability to adapt and adjust priorities in efficiently and on time	
Ability to communicate effectively with team members	
Ability to hold team members to account for tasks	
Ability to create and maintain strong interpersonal relationships	
Ability to coach team members to understand the agile processes	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

FINANCE LEAD / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Accounting background/experience (ACA/CPA or similar qualification)	
Ability to develop and manage \$1m+ budgets	
Ability to produce Integrated Reports	
Ability to shape and review contracts	
Ability to provide budget and cashflow forecasting	
Ability to provide strategic overview of financial situation given Lab strategy and direction	
Ability to plan for short and long term financial needs of the Lab	
Ability to adapt budgets and planning at short notice	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

COMMUNICATIONS LEAD / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to manage a budget of +/- \$100k	
Ability to manage a team of 3-7 people	
Ability to negotiate and sign contracts on behalf of the Lab	
Ability to deliver outputs across multiple workflows and timelines simultaneously	
Ability to give specific creative direction and feedback to team members, producers and creatives in a tactful, generative way	
Ability to design beautiful materials in a variety of media	
Ability to work with graphic design software such as Photoshop and Illustrator	
Ability to plan, shoot, edit and publish video	
Ability to work with film/video editing software	
Ability to work with a wide variety online tools, social media channels and softwares, including the ability to build and edit websites	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

COMMUNICATIONS SUPPORT / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to take direction and provide leadership in a fastpaced, outputs-oriented communications team while keeping a creative, flexible, generative mindset	
Ability to track, manage and deliver on priorities, outputs and timelines across multiple work-streams in a highly productive, self-directed fashion	
Ability to work with a wide variety of digital tools including video editing software (FCPX), design software (Illustrator/Photoshop), web design software (WordPress, Squarespace), online tools and social media channels	
Ability to write rich, compelling copy about a variety of social issues	
Ability to produce outputs in a timely manner, across media, attentive to detail	
Ability to engage and collaborate with diverse stakeholders from a variety of backgrounds and circumstances with skill, tact and respect for difference	
Ability to work with a keen design sense to ensure aesthetic continuity and quality of communications materials	
Ability to design materials in line with the visual identity and design guidelines of the Lab	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)





CONVENING AND RECRUITMENT LEAD / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to deploy a recruitment and selection strategy	
Ability to understand how diversity and the selection of a multi-stakeholder group impact the social dynamics, and the potential outcomes of the lab	
Ability to design targeted selection process that results in desired number and kind of participants	
Ability to communicate sensitively around issues of selection	
Ability to design on-boarding materials and process	
Ability to design selection criteria	
Ability to conduct effective interviews and selection processes	
Ability to lead a team of people through recruitment and selection process	
Ability to design and manage recruitment and selection data system	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

CONVENING AND RECRUITMENT SUPPORT / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to take direction and provide leadership in a fastpaced, team while keeping a creative, flexible, generative mindset	
Ability to track, manage and deliver on priorities, outputs and timelines across multiple work-streams in a highly productive, self-directed fashion	
Ability to engage and collaborate with diverse stakeholders from a variety of backgrounds and circumstances with skill, tact and respect for difference	
Ability to communicate sensitively around issues of selection	
Ability to support a recruitment and selection process to deliver targeted results	
Ability to use CRM/Stakeholder management system effectively	
Ability to manage	
Ability to design a recruitment and selection strategy	
Ability to deploy a recruitment and selection strategy	
Ability to design targeted selection process that results in desired number and kind of participants	
Ability to design on-boarding materials and process	
Ability to design selection criteria	
Ability to conduct effective interviews and selection processes	
Ability to lead a team of people through recruitment and selection process	
Ability to design and manage recruitment and selection data system	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)



STAKEHOLDER RELATIONSHIP MANAGMENT COORDINATOR / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to spark, nurture and maintain a large number of relationships across a variety of channels	
Ability to collaborate with the Lab Delivery Team to ensure effective flow of information back and forth	
Work with digital tools to document and report on the state of stakeholder relationships (such as CRM's, systems mapping software).	
Ability to identify high value relationships and grow them to benefit the Lab and support other Lab Team members to do the same	
Ability to collaborate with Communications Lead to identify and create effective communications to benefit the Lab in the stakeholder community	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

LEARNING HISTORIAN / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to understand and analyze the systemic dynamics of complex social challenges	
Ability to gather, sort, synthesize and analyze qualitative social-science data through interviews, participant observation and other methods	
Ability to document the proceedings and goings-on of meetings and events in a chaotic environment quickly and accurately	
Ability to type quickly and accurately	
Ability to use a wide variety of online and digital tools	
Ability to lay out documents and present data visually in an effective, aesthetically compelling way	
Ability to write copy that elicits the connections between the proceedings of the lab and the systemic context of the social challenge	
Ability to meet deadlines and work efficiently in a selfdirected fashion, and incorporate feedback from a number of different sources	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)



LEARNING DESIGNER / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to adapt learning design to support cultural differences and take the preferences of the target audience into account	
Ability to achieve desired learning outcomes through learning design	
Ability to adapt expected outcomes based on the audience’s prior skills, experience, expectations and needs	
Ability to design according to varying lengths and time available for learning interventions	
Ability to design for group sizes from 5-300 people	
Ability to understand adult learning needs and address these in design	
Ability to identify appropriate learning approach for audience or group	
Ability to conduct formal and informal needs assessments to inform learning design	
Ability to work in collaboration with subject-matter experts in design process	
Ability to incorporate multi-media into learning design	
Ability to draw on and integrate participatory design principles and approaches	
Ability to design and develop effective and clear learning materials	
Ability to identify when and how to use technology as a training and development solution	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)



LAB FACILITATOR / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to take cultural differences and preferences of the target audience into account when facilitating	
Ability to achieve desired learning outcomes through facilitation	
Ability to adapt expected outcomes based on what is emerging during the process, participants' feedback and shifting priorities	
Ability to adjust agendas and designs given time constraints and requirements	
Ability to read and skillfully navigate power dynamics in the room	
Ability to support the group to name and work with power dynamics to achieve and maintain effectiveness	
Ability to read the mood of a room	
Ability to name the mood and support the generation of a mood that will bring about the most effective working environment	
Ability to read conflict before and as it is occurring	
Ability to skillfully and effectively intervene in group conflict situations to support the group to resolve the conflict	
Ability to read systemic patterns and dynamics impacting the group space and working environment	
Ability to support the group to see systemic patterns and dynamics when they are impacting the space and work	
Ability to understand adult learning styles and needs	
Ability to adapt facilitation to meet variety of learning styles and needs	

LAB FACILITATOR / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to work in collaboration with and support subject matter experts preparing for and during workshop time	
Ability to make external stakeholders attending workshops feel supported, welcome and be effective	
Ability to draw on and integrate participatory learning principles and approaches	
Ability to facilitate for group sizes from 2-300 people	
Ability to use technology as a facilitation and learning tool	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

PROTOTYPING TEAM COACH / DELIVERY TEAM

FUNCTIONAL CAPABILITY	DEGREE*
Ability to coach others on a wide range of co-design practice, including human-centered design, lean startup, participatory methods, and rapid prototyping	
Ability to facilitate group dynamics and decision-making	
Ability to work both individually and collectively in support of Lab participants effectiveness	
Ability to identify improvements needed to the coaching program, and work collaboratively to implement them	
Ability to draw on and integrate action research principles and approaches	
Ability to take cultural differences and preferences of the prototyping teams into account	
Ability to understand adult learning needs and address these in coaching	
Ability to conduct formal and informal needs assessment to inform coaching	
Ability to work in collaboration with subject matter experts	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)





LAB OWNER / CONVENING ORGANISATION(S)

FUNCTIONAL CAPABILITY	DEGREE*
Ability and authority to commit the convening organisation to the Lab	
Ability to influence diverse and multiple stakeholders	
Ability to create and maintain strong interpersonal relationships and successfully managing relationship building dynamics and processes	
Ability to present and communicate Social Labs practice	
Ability to support Convening Organisation to build capability in Social Labs work	
Ability to inspire others	
Ability to navigate large, small and/or complex organisations, including gaining access to key stakeholders required for the Lab	
Ability to communicate personal and organisational learning from Lab participation	
Ability to articulate benefits of a Social Labs approach to complex challenges	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

LAB CHAMPION / CONVENING ORGANISATION(S)

FUNCTIONAL CAPABILITY	DEGREE*
Ability and authority to represent the Convening Organisation in the Lab	
Ability to influence diverse and multiple stakeholders	
Ability to create and maintain strong interpersonal relationships and successfully managing relationship building dynamics and processes	
Ability to manage conflict	
Ability to present and communicate Social Labs practice	
Ability to support Convening Organisation to build capability in Social Labs work	
Ability to inspire others and help people understand the Lab	
Ability to articulate benefits of a Social Labs approach to complex challenges	
Ability to make introductions and 'open doors' that support the work of the Lab	
Ability to communicate personal and organisational learnings from Lab participation	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

LAB OPERATIONS LEAD / CONVENING ORGANISATION(S)

FUNCTIONAL CAPABILITY	DEGREE*
Ability to navigate CO structure and relationships in support of Lab success	
Ability to negotiate and support contracts in the CO system	
Ability to influence and 'sell' the Lab as needed to CO members	
Ability to implement capability building strategy for CO to run to be an effective host organizations for Labs	
Ability to build relationships with multiple stakeholders across the Lab ecosystem as well as inside the CO	
Ability to communicate how Social Labs fits into the COs overall strategy	
Ability to manage multiple, and often competing priorities and stakeholder needs	
Ability to manage Lab budget for the CO	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)

**GOVERNANCE BOARD MEMBER** / CONVENING ORGANISATION(S)

FUNCTIONAL CAPABILITY	DEGREE*
Ability to understand and learn about the Lab challenge	
Ability to be effective in an iterative and emergent process	
Ability to have difficult conversations and raise issues important to the success of the Lab	
Ability to be open, curious and a learner	
Ability to work collaboratively with a variety of stakeholders	
Ability to engage effectively in a shared decision making process	

\* Degree to which we have this capability? 0 (not at all) > 5 (fully capable)