CCAT | tcc group

**New User Guide: CCAT Organizational Leads**

The Core Capacity Assessment Tool (CCAT), is a 146-question, online tool that measures an organization's effectiveness through an analysis of its four core capacities—adaptive, leadership, management, and technical—and organizational culture. At the end of this analysis, an organization will receive findings about its core and sub-capacity scores, life cycle stage placement, and prioritized and detailed capacity building plans that serve as a guide to determine "next steps" to improve effectiveness. Please refer to www.tccccat.com for more details on the core capacities and life cycle continuum.

Your organization now has the opportunity to assess its effectiveness using the CCAT. As the organizational lead, you are responsible for administering this assessment to the other senior leaders in your organization. This short document will describe what you need to do, and what you can expect, when you administer this assessment.

I know I'm supposed to take the CCAT. What do I do now?

As the organizational lead, you will receive an email from CCATHelp@tccgrp.com with the subject line "How to Get Started with your CCAT Organizational Assessment." It will have a link to the online assessment along with your username and password. Upon logging in for the first time, you will be confronted with the Set-up Wizard. **In Step 1, you add your respondents** (your name will already be on this list).

When selecting your respondents, we recommend that ALL senior leaders and managers of an organization take the CCAT (i.e., anyone, paid or volunteer, who is in the position to lead or manage any aspect of organizational planning and decision-making, as well as those who manage organizational resources). Additionally, it is important to identify one to three board members to also take the CCAT.
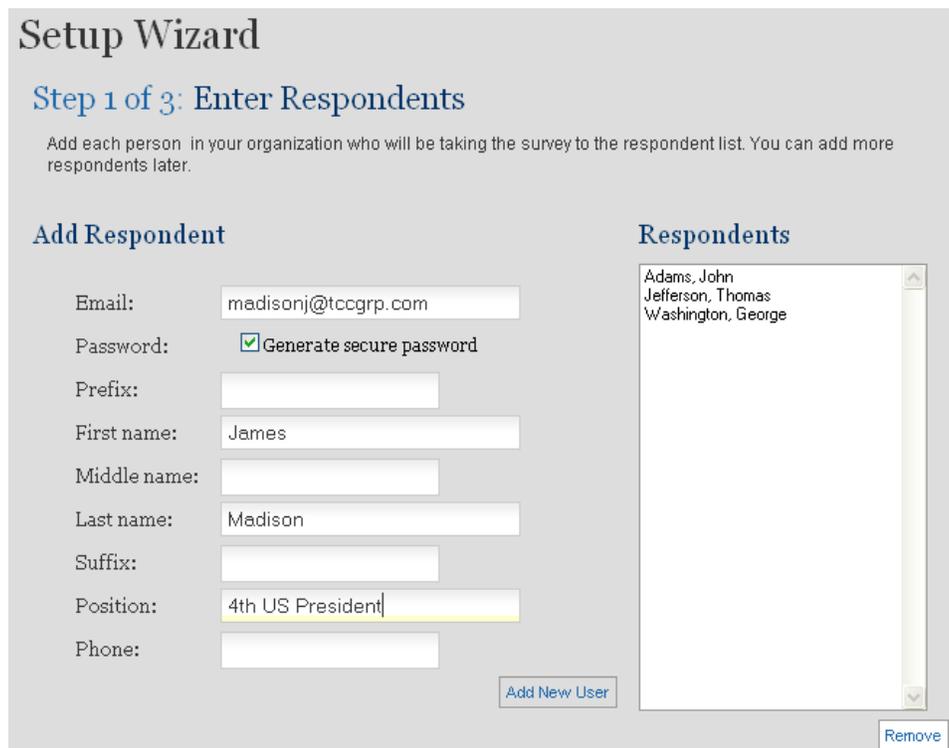
Setup Wizard

Step 1 of 3: Enter Respondents

Add each person in your organization who will be taking the survey to the respondent list. You can add more respondents later.

Add Respondent

Email:	madisonj@tccgrp.com
Password:	☑ Generate secure password
Prefix:	
First name:	James
Middle name:	
Last name:	Madison
Suffix:	
Position:	4th US President
Phone:	

[Add New User]

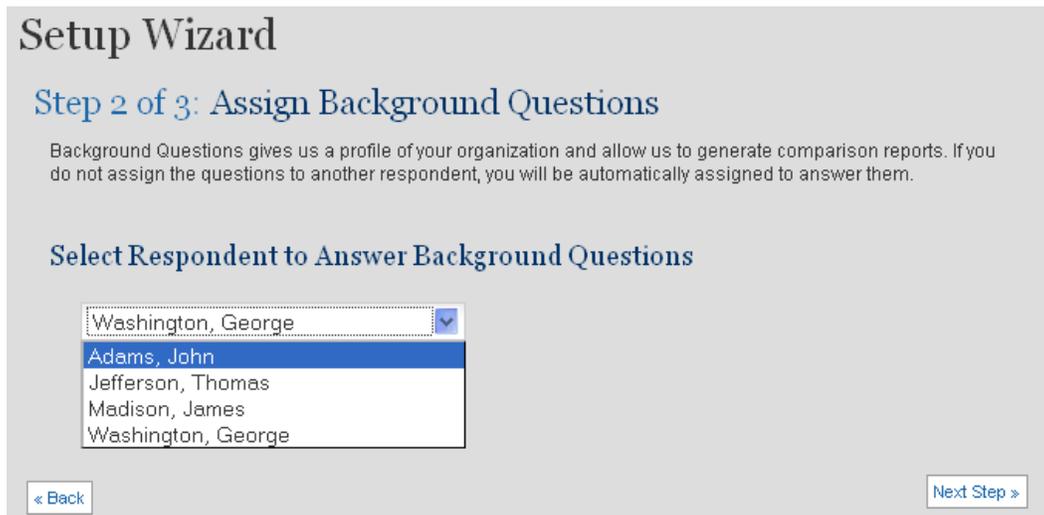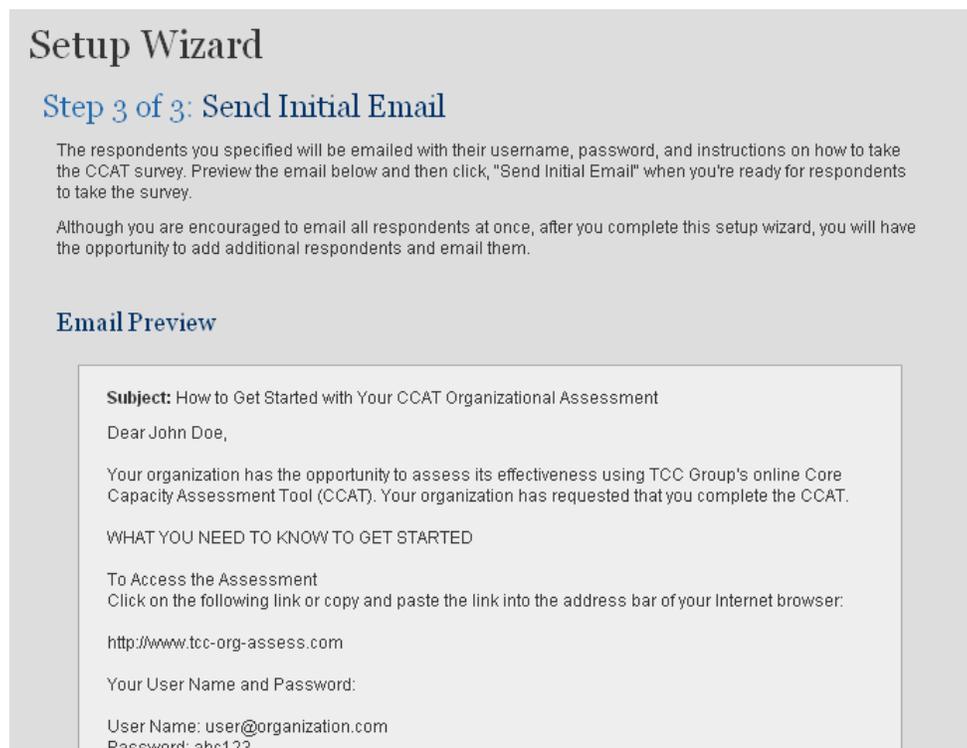**Respondents**

Adams, John
Jefferson, Thomas
Washington, George

[Remove]

In Step 2, you will select the respondent who will complete the background question section. The background questions are a part of the CCAT that ask for some historical and budgetary information about your organization. Please note that these questions are in addition to the 146 questions of the assessment. As organizational lead, this is assigned to you, but you may select someone else.

Setup Wizard

Step 2 of 3: Assign Background Questions

Background Questions gives us a profile of your organization and allow us to generate comparison reports. If you do not assign the questions to another respondent, you will be automatically assigned to answer them.

Select Respondent to Answer Background Questions

Washington, George ▾
- Adams, John
- Jefferson, Thomas
- Madison, James
- Washington, George

« Back   Next Step »

In Step 3, you will preview and send the automated email that will be sent to the respondents you entered in Step 1. You may view the email, but may not edit it. As you can see, this email contains the automatically generated username and passwords for your respondents.

Setup Wizard

Step 3 of 3: Send Initial Email

The respondents you specified will be emailed with their username, password, and instructions on how to take the CCAT survey. Preview the email below and then click, "Send Initial Email" when you're ready for respondents to take the survey.

Although you are encouraged to email all respondents at once, after you complete this setup wizard, you will have the opportunity to add additional respondents and email them.

Email Preview

Subject: How to Get Started with Your CCAT Organizational Assessment

Dear John Doe,

Your organization has the opportunity to assess its effectiveness using TCC Group's online Core Capacity Assessment Tool (CCAT). Your organization has requested that you complete the CCAT.

WHAT YOU NEED TO KNOW TO GET STARTED

To Access the Assessment
Click on the following link or copy and paste the link into the address bar of your Internet browser:

http://www.tcc-org-assess.com

Your User Name and Password:

User Name: user@organization.com
Password: abc123

At the bottom of the Step 3 page, **you must click "Send initial email" in order to email your respondents their unique usernames and passwords.**
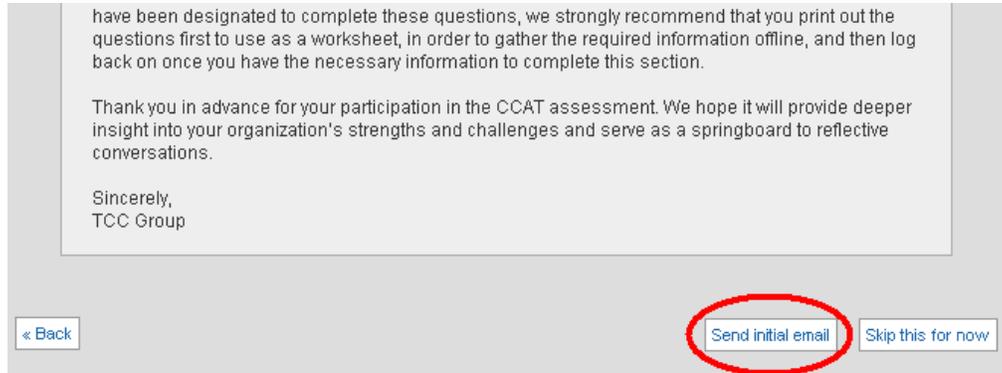
I've completed the Setup Wizard. What do I do now?

Upon finishing the Setup Wizard, or exiting the CCAT and logging in again, you will see the Organizational Lead Manager page. From this screen you can do a number of things.

On this page, you are able to:

1. Take the CCAT yourself by clicking "Take Survey" at the top of the page.
2. Complete the background questions (if that role is assigned to you) by clicking "Background Questions" at the top of the page. You can also change who should complete these questions by using the drop-down menu below the list of respondents in the "Users" section.
3. Add a new respondent by clicking "New Respondent" in the "Users" section. You must manually send an initial email once they are added to the list by clicking "Send" in the "Initial Email" column that corresponds to the row containing the new respondent's name.
4. Send individual reminder emails to individual respondents by clicking "Send" in the "Reminder Email" column for specific individuals. For example, if you needed to send John Adams a reminder, you could click "Send" in the "Reminder Email" column that corresponds to the row containing Adams's name.

Overall, you can use this page, specifically the list in the "Users" section, to monitor your respondents' progress. A check mark will appear in the "Complete" column when a respondent has completed all of the questions.

I entered someone's email address wrong. How can I fix it?

In the "Users" section of the Organizational Lead Manager page, click the email address/username of the respondent you wish to change:

Users

New Respondent

Username	First name	Last name	Complete	Current Q	Last Answered	Emails Sent	Initial Email	Reminder Email
gwashingtonpresident@tccgrp.com	George	Washington	☐			0	Send	Send
thomasjefferson@tccgrp.com	Thomas	Jefferson	☐			1	Send	Send
AdamsJohnPresident@tccgrp.com	John	Adams	☐			1	Send	Send
madisonj@tccgrp.com	James	Madison	☐			1	Send	Send

Background Respondent: Washington, George ▾ Save

You will see the following screen:

Make your changes and click "Save and Close." Once you click "Save and Close," you will have to send the respondent another email so that they receive their username and password at the correct email address:

Can I use the 'Add/Edit User' screen to delete someone from my list of respondents?

No. From the example above, it would appear that you could potentially delete all information relating to a respondent (i.e. delete their email address, first name, and last name) in order to remove them from your list of people necessary to complete the assessment. You are not allowed to delete users from the CCAT. Attempting to do this could prevent your organization from being able to finish the assessment. If you wish to remove a respondent, please contact the CCAT Help Desk.

Are there any other ways in which I can remove a respondent from my list?

No, after completing the Setup Wizard, you may not remove anyone from your list. Please contact the CCAT Help Desk for assistance.

I've completed the assessment, what next?

Once the last respondent from your organization completes the assessment, the organizational lead will receive an automated email indicating that she or he log in and download the CCAT report. The report is in PDF format, requiring that the user has Adobe Acrobat Reader.

It is important that each respondent entered for your organization completes the CCAT. The system will send automated reminders to each respondent over time. The first is sent after one full week. We recommend that the organizational lead check response rates and continue to encourage respondents.

Additional Assistance:

Please refer to the online resources at www.tccccat.com if you have further questions on the CCAT, or getting started with the assessment. If you require additional assistance, or if you are experiencing technical difficulties, please contact our CCAT Help Desk at:
CCATHelp@tccgrp.com or 866- 470-2258.