

FREE TEMPLATE

Partner Capacity Assessment

Six domains, four maturity levels and one plan to strengthen what matters most.

1. About the partner

Organization

Country and region

Year founded

Staff and volunteers

Annual budget (approx.)

Main sectors

Assessment round (baseline / follow-up)

Date

Completed by (name, role)

Reviewed by (name, organization)

2. How to use this assessment

- 1 Agree the domains first.** Read the six domains with the partner and adapt the indicators to the context before anyone rates anything.
- 2 Self-assess.** The partner's team rates each indicator from 1 to 4 and writes the evidence: a document, a practice, an example.
- 3 Review together.** The program officer goes through the evidence with the partner. Where you disagree, write both levels and why.
- 4 Pick three priorities.** Not thirty. Turn them into the capacity strengthening plan on page 4.
- 5 Reassess in 6 to 12 months.** Same indicators and the same scale, so the change is visible.

3. The maturity scale

1 Emerging

Little or nothing in place yet; it depends on one or two people.

2 Developing

The basics exist on paper and are used some of the time.

3 Established

Practices are written down, used routinely and checked.

4 Advanced

Practices are reviewed, improved and shared with others.

A domain's level is the level most of its indicators reach; on a tie, take the lower one. Rate what you can show today, not what is planned.

4. The six domains

Domain	What it looks at
1. Governance and leadership	Who decides, how, and who holds them to account.
2. Financial management	Whether money is planned, recorded and controlled.
3. Program management	How projects are planned, run and adjusted.
4. MEAL	Monitoring, evaluation, accountability and learning: what changes because of the work.
5. People and safeguarding	How staff are hired and supported, and how people are kept safe.
6. Partnerships and advocacy	How the organization works with others and shapes its context.

This assessment is for planning support together, not for deciding funding. Keep it apart from due diligence and compliance checks: a partner that fears losing its grant will not show you its gaps.

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Domain 1. Governance and leadership

Who decides, how, and who holds them to account.

Indicator	1	2	3	4	Evidence / notes
Mission and strategy are written down and staff can explain them	☐	☐	☐	☐	
A board or governing body meets regularly and keeps minutes	☐	☐	☐	☐	
The roles of the board and of management are separate and clear	☐	☐	☐	☐	
A conflict of interest policy exists and is applied	☐	☐	☐	☐	
Strategy and main risks are reviewed at least once a year	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

Domain 2. Financial management

Whether money is planned, recorded and controlled.

Indicator	1	2	3	4	Evidence / notes
An annual budget is approved and followed monthly against actuals	☐	☐	☐	☐	
Accounting follows written procedures and keeps supporting documents	☐	☐	☐	☐	
Payments need two people: one prepares, another approves	☐	☐	☐	☐	
Accounts are audited or independently reviewed every year	☐	☐	☐	☐	
Purchases follow written procurement rules	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

Domain 3. Program management

How projects are planned, run and adjusted.

Indicator	1	2	3	4	Evidence / notes
Each project has objectives, a work plan and a budget	☐	☐	☐	☐	
Progress is tracked against the work plan at least monthly	☐	☐	☐	☐	
Risks are identified and each one has an owner	☐	☐	☐	☐	
Communities take part in design and give feedback	☐	☐	☐	☐	
Lessons from past projects are used in new ones	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

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Domain 4. MEAL

Monitoring, evaluation, accountability and learning: what changes because of the work.

Indicator	1	2	3	4	Evidence / notes
Indicators have baselines and targets	☐	☐	☐	☐	
Data is collected with consistent tools and checked for quality	☐	☐	☐	☐	
Reports go out on time and match the data	☐	☐	☐	☐	
Communities can give feedback or complain, and get an answer	☐	☐	☐	☐	
Findings are discussed and lead to changes in programs	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

Domain 5. People and safeguarding

How staff are hired and supported, and how people are kept safe.

Indicator	1	2	3	4	Evidence / notes
Written HR policies: recruitment, contracts, pay and leave	☐	☐	☐	☐	
A code of conduct is signed by all staff and volunteers	☐	☐	☐	☐	
A safeguarding policy, a focal point and a safe reporting channel	☐	☐	☐	☐	
Recruitment includes reference and safeguarding checks	☐	☐	☐	☐	
Each staff member has a yearly learning plan	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

Domain 6. Partnerships and advocacy

How the organization works with others and shapes its context.

Indicator	1	2	3	4	Evidence / notes
Working relations with local authorities and community leaders	☐	☐	☐	☐	
Member of a network, coalition or platform	☐	☐	☐	☐	
More than one funder, and none above half of the income	☐	☐	☐	☐	
Results are shared publicly at least once a year	☐	☐	☐	☐	
Has influenced a local policy or practice in the last two years	☐	☐	☐	☐	

Domain level (1 to 4)

Main gap to work on

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5. Summary by domain

Domain	Self-assessed level	Agreed after review	Priority for the next 12 months?
1. Governance and leadership			
2. Financial management			
3. Program management			
4. MEAL			
5. People and safeguarding			
6. Partnerships and advocacy			

6. Capacity strengthening plan

Three priorities at most. Each action has an owner, a date and the support the partner needs from you.

Priority area	Action	Support needed	Owner	By when

7. Next assessment

Follow-up assessment date

What we will look at first

8. Sign-off

Partner representative

Program officer

Date

Date

Both organizations keep a copy. The partner may share these results with its other funders, so it does not have to be assessed again for the same thing.