

FILLED-IN EXAMPLE

Partner Capacity Assessment

Riverbend Women's Forum, baseline, October 2026 (a fictional organization)

1. About the partner

Organization

Riverbend Women's Forum

Year founded

2014

Annual budget (approx.)

USD 180,000

Assessment round (baseline / follow-up)

Baseline

Completed by (name, role)

Grace Achieng, Executive Director

Country and region

Kenya, Kisumu County

Staff and volunteers

11 staff, 40 volunteers

Main sectors

Women's livelihoods, GBV prevention

Date

12 October 2026

Reviewed by (name, organization)

Amina Odhiambo, Horizon Child Fund

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	☐	☒	☐	☐	Strategy 2024-2027; staff not briefed
A board or governing body meets regularly and keeps minutes	☐	☒	☐	☐	Meets 3 times a year; minutes kept
The roles of the board and of management are separate and clear	☐	☒	☐	☐	Chair also approves payments
A conflict of interest policy exists and is applied	☒	☐	☐	☐	No policy yet
Strategy and main risks are reviewed at least once a year	☐	☒	☐	☐	Risks discussed, not written

Domain level (1 to 4)

2

Main gap to work on

Conflict of interest policy and register

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	☐	☐	☒	☐	Budget vs actual monthly since 2025
Accounting follows written procedures and keeps supporting documents	☐	☒	☐	☐	Procedures from 2019, out of date
Payments need two people: one prepares, another approves	☐	☒	☐	☐	Two signatures above USD 500 only
Accounts are audited or independently reviewed every year	☐	☒	☐	☐	Accountant's review, no full audit
Purchases follow written procurement rules	☐	☒	☐	☐	Three quotes above USD 1,000

Domain level (1 to 4)

2

Main gap to work on

First external audit

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	☐	☐	☒	☐	Logframe and work plan per project
Progress is tracked against the work plan at least monthly	☐	☐	☒	☐	Monthly review meeting
Risks are identified and each one has an owner	☐	☒	☐	☐	Risk list for one project only
Communities take part in design and give feedback	☐	☐	☒	☐	Community committees in 4 villages
Lessons from past projects are used in new ones	☐	☐	☒	☐	After-action review per project

Domain level (1 to 4)

3

Main gap to work on

A risk register for every project

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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	☒	☐	☐	☐	Targets set, no baselines
Data is collected with consistent tools and checked for quality	☒	☐	☐	☐	Paper forms, no checks
Reports go out on time and match the data	☐	☒	☐	☐	On time; numbers copied by hand
Communities can give feedback or complain, and get an answer	☒	☐	☐	☐	Feedback only through field staff
Findings are discussed and lead to changes in programs	☒	☐	☐	☐	Findings not discussed

Domain level (1 to 4)

1

Main gap to work on

Baselines and one digital data form

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	☐	☒	☐	☐	Contracts yes; no pay scale
A code of conduct is signed by all staff and volunteers	☐	☐	☒	☐	Signed by all 11 staff
A safeguarding policy, a focal point and a safe reporting channel	☐	☒	☐	☐	Focal point named; no channel yet
Recruitment includes reference and safeguarding checks	☒	☐	☐	☐	References only
Each staff member has a yearly learning plan	☐	☒	☐	☐	Training when funded

Domain level (1 to 4)

2

Main gap to work on

Safe reporting channel, safer recruitment

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	☐	☐	☒	☐	MoU with the county gender office
Member of a network, coalition or platform	☐	☐	☒	☐	County GBV network member
More than one funder, and none above half of the income	☒	☐	☐	☐	One funder is 70% of income
Results are shared publicly at least once a year	☐	☒	☐	☐	Annual report, not online
Has influenced a local policy or practice in the last two years	☐	☒	☐	☐	Input to the county GBV plan 2025

Domain level (1 to 4)

2

Main gap to work on

A second funder

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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	2	No
2. Financial management	3	2	Yes
3. Program management	3	3	No
4. MEAL	2	1	Yes
5. People and safeguarding	2	2	Yes
6. Partnerships and advocacy	2	2	No

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
Financial management	Commission the first external audit (FY 2026)	Audit fee in the 2027 grant	Finance officer	Mar 2027
MEAL	Set baselines for the 3 main indicators; move to one digital form	MEAL coaching, 3 days	Program coordinator	Jan 2027
People and safeguarding	Open a safe reporting channel; add safeguarding checks to hiring	Policy template, focal point training	Executive Director	Dec 2026

7. Next assessment

Follow-up assessment date

April 2027

What we will look at first

MEAL baselines and the audit

8. Sign-off

Partner representative

Grace Achieng

Program officer

Amina Odhiambo

Date

19 October 2026

Date

19 October 2026

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.