FREE GUIDE

Choosing How to Assess Partner Progress

Three ways to know where each partner stands, and how to choose the one that fits your program.

1. The three ways

1 Self-assessment

The partner places itself on the grid. The fastest for your team, and it builds ownership. It is as good as the partner's candor and the clarity of each stage.

2 Automatic

The work moves the partner: every initiative of a step at 100%, its surveys answered, its documents signed. Objective and hands-off. It is as good as the work you attach to each step.

3 Set by you

Your team reviews the evidence and decides each position. The most rigorous, and it costs your team time. Right when a position has consequences.

2. How they compare

	Self-assessment	Automatic	Set by you
Who places the partner	The partner	The work done	Your team
Your team's effort	Low: review, and a conversation once a year	Lowest: design the steps well, once	High: a review per partner and step
The partner's effort	Reflect and decide	Do the work, record it	Send evidence, wait for you
What it builds	Ownership and reflection	A clear, shared path	Rigor and comparability
Main risk	Too generous, or too modest	Ticking boxes without real change	Your team becomes the bottleneck
Works best when	Trust is high and partners are mature	Steps are concrete and checkable	A move unlocks money or recognition

3. Five questions to choose

1. **What happens when a partner moves up a stage?** If nothing beyond learning, let partners assess themselves. If funding, recognition or a certificate depends on it, set it yourself, or make the step's work the evidence.
2. **How concrete is the work between stages?** A signed document, a training held, a survey answered: let the work move them. A judgment of quality: self-assessment, or your team.
3. **How much do you trust each other today?** A long relationship and an open culture of feedback favor self-assessment. A new partnership, or a culture where rating yourself highly feels improper, favors your team setting it, with the reasons explained, for now.
4. **How many partners per person on your team?** Many partners and a small team: self-assessment or automatic. A few partners followed closely: you can set it yourselves.
5. **What should partners learn from the program?** To reflect and own their development: self-assessment. To follow a defined path: automatic. To meet a standard: set by you.

Whatever the way: keep the date and the reason of every move. Your monitoring, your reports and your evaluation will ask for them, and a partner who moved back deserves to know why.

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4. Score your program

For each factor, find the column that describes your program best, and write it in the last column. The way that comes up most often is your starting point; a factor that matters a lot to you can decide on its own.

Factor	Points to self-assessment	Points to automatic	Points to set by you	Your program
What a move changes	Nothing but learning	Access to the next step's work	Funding, recognition, a certificate	
The work between stages	Qualitative, about practice	Concrete, checkable items	Needs an expert's judgment	
Trust and track record	Years of working together	Some history, clear rules	New partners, or past disputes	
Feedback and hierarchy	Partners speak up openly	Rules matter more than people	Partners expect the funder to decide	
Partners per team member	More than 15	More than 15	15 or fewer	
What partners should learn	To own their development	To follow a shared path	To meet a standard	

5. Decide and write it down

Program

Partners (how many, which group)

The way chosen

Why, in one sentence

Who checks positions, and how often

Review the choice on

6. Make it work

- [ ] Self-assessment: describe every stage with something you can see, ask for evidence on the key steps, and talk positions through with each partner once a year.
- [ ] Automatic: attach work that really shows progress, keep each step small, and look at partners who have not moved in months.
- [ ] Set by you: write down the evidence each stage needs, tell partners when you will review, and let them ask for a review.

7. Signs it is time to change the way

- [ ] Self-assessed positions and what you see on visits disagree, again and again: add evidence to the key steps, or set positions yourselves for a while.
- [ ] Partners finish the work of a step and still wait weeks for your review: let the work move them (automatic).
- [ ] Everyone moves, but nothing changes on the ground: the work attached to the steps is too easy. Rewrite it, or review positions yourselves.
- [ ] Your team spends more time confirming positions than helping partners: hand the placing back to partners or to the work.
- [ ] Partners ask why they are where they are: write down what each stage needs and share it, whatever the way.

In Advancer.World the way is set per program: Design > Program settings > State progression. Partner groups that need different ways can run as two programs, and you can change the way later: switching to automatic recalculates every partner's position from the work they have done.

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