Partner & Partnership Development
Guidance note

Approved by: T. Schmidt

Date of approval: October 2019

Last revised: November 2023

Version: v2.1

Contents

Introduction

CBM envisions an inclusive world in which all persons with disabilities enjoy their human rights and achieve their full potential. We believe that this can best be achieved by uniting efforts with other development actors. For this reason, we work with and enable a range of partners who offer reach, effectiveness and impact to pursue our common vision of a more inclusive world.

This document complements the Quick Process Reference Guide (QPRG) for Partnership – assessment, approval, management and exit by elaborating on the different process steps. It includes definitions, criteria and categories to review and categorise partner portfolios. It also provides information on key considerations that should be taken into account in all interactions with partners.

The guidance and tools for the Partnership – assessment, approval, management and exit process were reviewed by a working group made up of representatives from the Africa East & West, Asia and Latin America Region, and the Strategic Partner & Portfolio Management Team (SPPM). The working group was facilitated by the Programme Standards and Quality Team (PSQ).

Definition of Partner, Strong partner, Partnership and Capacity development

A **Partner** is an organisation with a shared vision, with whom CBM enters into a partnership to collaborate and achieve a jointly defined purpose.

Strong partner are organisations whose capacity exceeds the partner assessment minimum criteria and meet CBM contractual requirements. Strong partners are expected to continuously improve their capacities on governance & leadership, finance and programme, to excel in these domains and ensure that they fulfil their mandate over time in a sustainable manner.

Partnership is the collaboration between CBM and an organisation to unite efforts, promote ownership and shared accountability with a view to achieve a common purpose. Partnerships can involve funds or not. Partnerships involving funds are based on a contract and can only be developed with organisations that are legal entities.

Capacity development is the process of individual and organisational development that supports the achievement of development aims by building on existing systems, skills and knowledge through a dynamic and flexible process of change. Capacity development has a strong element of sustainability. It can have various programmatic, financial and organisational dimensions.

A. Partnership approach and resources

1. CBM Partnership Pathway

Working with and enabling organisations is central to CBM's vision to develop needs based, sustainable programmes. According to CBM Partnership Principles, partnerships should be long enough to assess impact but regularly reviewed to avoid dependency and ensure mutual benefit.

CBM works with a broad range of governmental and non-governmental organisations, with different capacities and expertise. Recognising each other's contribution to the partnership is key to develop fruitful collaborations, create synergies and leverage resources. This will also contribute to strengthening mutual learning, reach and sustainability.

CBM partnerships are developed with the intention of strong development outcomes. Irrespective of the starting point, all partnerships are expected to progressively develop within the course of the partnership.

Picture 1. CBM partnership pathway: expected graduation from partnerships with funding to collaboration partnerships.

A flexible approach to partner portfolios will nevertheless be followed. The partnership pathway does not need to be the same for all partners. Partners can graduate between partnership types throughout the partnership. For example, a collaboration partner could become a project partner to pursue a specific funding opportunity.

The partnership pathway envisages a gradual enablement of partners to sustain programme outcomes without CBM's support. Sustainability considerations should form part from the onset of the partnership. Support to strengthen the sustainability of programme outcomes and organisational performance should therefore form part of the long-term approach to the partnership and not only be addressed at the end.

2. Sustainability and the Programme Quality Framework

Sustainable Development, in a broad sense, is defined as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs.' (UN: Our Common Future, 1987) It refers to the expectation that any activity should consider and balance its economic, social and ecological impact.

In CBM, such considerations are integrated into our Programme Quality Framework (PQF) and mainstreamed in our core programmatic processes and tools related to Partnership and Project Design/Planning.

In the sense of the programmatic context and CBM's project work, sustainability is the aspiration of continuing the desirable programme benefits after CBM funding support ends. This requires long-term planning to ensure that projects are well-rooted in local structures and resources; and involvement of all stakeholders to enable communities to gradually take-over responsibilities for the programme outcomes.

Dialogue and consultation play an important role in strengthening sustainability. They contribute to building a better understanding of the links between sustainability and exit and help determining:

- What is the strategic interest in taking forward activities without the support of CBM;

- What services/activities should be continued after CBM support ends and how to sustain programme outcomes;

- What support is required to enable continuation of programme outcomes;

- How partner organisational performance and sustainability could be strengthened to support the continuation of activities/services.

Discussing sustainability at an early stage will allow the integration of activities to strengthen capacities into the process for partnership and project development (see picture 2). Partners, together with CBM, can then work towards expected programme outcomes.

3. Resources for partnerships

Resources for partner portfolio development and management must be ensured during country planning, in line with CBM's development expectations and available resources. Technical expertise and Country Office (CO) capacity needs will be taken into consideration during the CO/PQF capacity assessment.

When technical expertise and resources are not available within the CO or the Regional Hub, support for a team of competences can be requested from the Finance and Operation Division. If external expertise is necessary and funding is available, support can also be contracted in. This should also be considered at the time of country planning and CO/PQF capacity assessment.

Capacity development activities with partners are included into the organisation's MYP.

Picture 2: Mainstream measures to strengthen sustainability through CBM processes

What to sustain? What resources are needed?

- Identify what needs to be sustained and how
- Identify exit timeline & criteria

Partner assessment

- Build into the PA Action Plan agreed measures to strengthen organisational skills, systems and processes

Project plans

- Build into the project plan activities to strengthen the sustainability of project outcomes, as well as any capacity development measures requiring funding

B. Management of partner portfolios

1. Criteria for identification and review of partner portfolios

The CO partner portfolio is generally reviewed during the country planning process. The aim is to ensure that partnerships are adequate to and support the delivery of the Country Plan. Partnerships may also be developed throughout the year in response to emerging opportunities.

Criteria for partner identification and partner portfolio review are as follows:

- Relevance: the organisation's work focuses on one or more of CBM International's Initiatives and CBM International's strategy

- Added value: the organisation's work is innovative, builds on sustainable approaches and adds value to the CO portfolio

- Networks: the organisation works with a variety of organisations and has a good standing with communities and stakeholders

- Coverage: the organisation has the capacity to reach specific and/or hard to reach groups and geographical areas

- Awareness: the organisation is interested in engaging with CBM

- Sustainability: the organisation does not rely on CBM's support to maintain programme benefits

- Strategic value: the organisation offers significant advantages to CBM (e.g. for fundraising, expertise or to enable work in a country) and to beneficiaries

Partners do not need to meet all the above criteria. The criteria provide guidance on areas to be considered during partner identification and portfolio review, with a view to align (prospective) partners with strategic priorities.

The capacity of partners including the scoring of the partner assessment (see section B4) also needs to be taken into consideration during decisions on partner portfolio. Only in exceptional circumstances will CBM work with partners that do not meet the minimum criteria of the partner assessment and/or do not add value to the partner portfolio.

2. Partnership categories

Partnerships will be categorised according to their expected contribution to the Country Plan. CBM broadly defines four categories of partnerships:

A. Prospective: relationships with organisations that focus on piloting of prospective strategic partnerships or capacity development of organisations before further development of the partnership with CBM. Support is also provided to prepare organisations for LCDF opportunities.

B. Project: partnerships that are developed to respond and deliver a specific project e.g. respond to a funding opportunity arising during the year. After project end, the organisation either becomes a strategic partner or a collaboration partner.

C. Strategic: partnerships that are based on a shared vision and long-term commitment to a jointly agreed objective (i.e. could include several project cycles). Work with the organisation is broader than project delivery and includes mutual exchange of knowledge and expertise.

D. Collaboration: partnerships that are not based on project funding e.g. advocacy campaigns, technical working groups, exchange of information, etc. Organisations can be offered funding opportunities arising during the year. In such cases, the partnership will become a project partnership or strategic partnership.

The categorisation of partnerships will enable alignment of available resources with partner portfolio, as well as prioritisation of resources for capacity development according to contribution of the (prospective) partner to the attainment of the country plan.

3. Review of organisation capacities (partner assessment)

For partnership categorised A to C, a Partner assessment (PA) is conducted with all new partners[1]. The aim of the PA is to help organisations identify organisational strengths and weaknesses and to ensure that capacities are appropriate for the intended partnership. The PA is also an opportunity to have a critical dialogue in line with CBM's Partnership Principles that allows mutual feedback and learning.

A CO team made up of finance, programme and Initiative staff jointly conducts the PA. If a technical assessment is required, this will be conducted with the support of a CBM advisor at a mutually agreed time. Any extensive technical assessment of partners by the Initiatives should be considered as an annex instead of an integral part of the standard PA Tool. The overlaps between technical assessments from the Initiatives (for example, governance questions) and the PA tool should be identified and duplications removed.

The type of legal registration of the organisation with an approving body responsible for the sector should be checked. This is particularly relevant in the case of offices of INGOs in programme countries

---

[1] The QPRG provides guidance on conducting PAs with INGOs, Governments and Universities. GTM recordings covering case-studies of PAs with governments, DPOs and NGOs are available in CBMnet.

and when applying to LCDF. In such cases, it should be clarified whether the INGO office in the programme country is registered as a branch of the INGO or as a local organisation.

If there are limitations to conduct a complete PA, for example with Government institutions, a desk review can be conducted to document the structure, practices and capacity of the organisation. The outcome of the desk review will be documented in the PA tool[2].

In exceptional circumstances, if the timeframe to submit a Concept Note or to develop an emergency response project does not allow a complete PA to be completed, a PA minimum criteria check can be conducted[2].

If capacity gaps exist, activities to strengthen capacity will be jointly developed with the partner. Annex 3 and 4 provide guidance on areas that can be gradually strengthened by the partner to improve the quality, accountability and sustainability of work, as well as organisational performance.

Activities that can be conducted without external support, and areas where technical assistance or funding is required, will be jointly discussed. Outcomes of other assessments (e.g. technical assessments, audits, compliance check etc) can be included in the PA Action Plan.

If there are no capacity gaps, an Action Plan does not need to be developed. In such cases, COs should explore with the organisation opportunities for sharing of good practices and to provide support to other partner organisations.

The outcomes of the PA provide the basis for programme/partnership managers to make a sound judgement when recommending how to engage with the organisation. Programme/partnership managers can also seek further information about the organisation to complement the information collected during the PA.

Additional information could be collected by requesting references (from other donors or stakeholders), visiting project sites or getting in touch with stakeholders acquainted with the work of the organisation.

4. Partner assessment tool: minimum criteria and scoring

The partner assessment tool is divided into three main parts: 1) information about the organisation, 2) questionnaire, includes a governance & leadership, finance and programme section, and 3) action plan.

The questionnaire includes a set of minimum criteria (red criteria) and criteria to attain (green criteria) for each section of the questionnaire. The PA Minimum Criteria is the basis to determine whether an organisation is eligible to receive funding from CBM. Criteria to attain (green criteria) focus on areas that demonstrate capacity and provides guidance on areas that could be gradually strengthened to improve organizational performance.

The PA criteria enables to define levels of capacity (see Annex 3) as follows:

- Level 1, partner with capacity: the PA minimum criteria is in place.

- Level 2, strong partners: the PA minimum criteria and selected green criteria are in place.

- Level 3, very strong partner. The partner capacity goes beyond criteria of the partner assessment.

---

[2] The Quick Process Reference Guide provides further guidance on the way to proceed in such cases.

Scoring is provided to each criteria of the PA according to the define levels of capacity (see Annex 3). The scoring is attributed automatically according to the selected appraisal in the partner assessment tool.

The scoring supports work with partners as follows:

- Ensures that partners meet the minimum criteria of the partner assessment
- Enables prioritization of resources for capacity development, by categorizing partners according to their capacity level
- Supports monitoring of partner development
- Supports decisions on partner portfolio

In exceptional circumstances, if the PA minimum criteria is not met but the (prospective) partner is key to the attainment of the country plan, the Country Director will recommend how to develop the collaboration without transfer of funds. For example, by providing support on basis of invoicing, etc. The way forward will be agreed in line with CBM's operating model.

5. Monitoring of partner and partnership management

Regional advisors will always be informed and invited to join partner monitoring visits.

Monitoring of the partnership needs to be conducted at least once every 6 months, ideally during project monitoring visits to:

- Monitor and ensure that agreed deadlines are met and corrective action is taken, as well as to support the implementation of any planned actions, drawing on relevant technical support.
- Ensure that the PA Action Plan is updated and submitted by the partner to CBM every 6 months as an annex to the narrative project report and that it is uploaded onto the partner profile.
- Seek out opportunities for joint learning and networking between partners, facilitating opportunities for exposure and introductions to other organisations, as well as knowledge transfer.
- Identify opportunities to further the partnership and develop a MYP and relevant new projects in line with the Country Plan.

Existing reporting tools and processes are used to document how the work of the organisation is changing as a result of the partnership. A joint reflection on support provided and capacity developed will be conducted with the partner. The partner will also be proactively prompt to provide feedback on the partnership.

CBM staff will document their own learnings from the partnership and from partnership management through the existing reporting tools and processes.

Partnerships that pose increasing risks to CBM will be flagged up to the Strategic Portfolio and Partner Management (SPPM) team. In such cases, the SPPM team together with the Regional Hub, Initiative and the Country office, will support decisions on how to proceed with the partnership.

6. Partnership review

For partnerships categorised A to C, the PA is reviewed at least once every 3-years to take stock of internal and external changes in the environment and to mutually assess partnership progress. This will be done ideally in conjunction with the development of a new MYP.

Criteria for partnership portfolio review (see section B1) supports discussions. In addition, the following should be considered:

- Continued added value of the partnership to attaining the Country Plan and mutual interest in continuing the partnership.

- Partner's continued capacity to fulfill the PA criteria, as well as to deliver project objectives, results and outcomes in a timely manner.

- Progress made in the implementation of the PA Action Plan.

- Any critical issues/provisos related to the partner's capacity, which have arisen during the project implementation.

- Partner's progress made in integrating lessons-learned, audits and evaluation findings, into the organisation's programmes, policies and operations.

The PA can also be reviewed concurrently with other CBM assessments, such as mid-term reviews, technical assessments, evaluations and audits, provided that organisational, financial and programmatic elements of the PA are built into the ToRs.

Assessments conducted by other donors can also be taken into consideration, if areas specific to CBM's work are additionally covered or reviewed by the CO.

The CO can initiate a review ahead of the scheduled 3-year frequency for the partner assessment. For example, if:

- Considerable delays in implementing, reporting and achieving project results exist.

- Limited response or lack of immediate and corrective action from the partner to challenges or critical issues arising during the project implementation.

- Potential for significant increase in funding level provided to the partner and/or complexity of a new project with stringent compliance requirements (e.g. LCDF).

7. Partnership continuation or exit

The outcome of the partnership review feeds into discussion on partnership continuation or exit. Decisions on how to proceed with the partnership are made in line with the three-way country collaboration and the authority matrix. Reasons for exit could include:

- Outcome of the partnership review, including limited progress on the implementation of the PA Action plan or development of capacities

- Identification of critical issues at the level of the partner and lack of response from the partner to address the same (immediate exit).

- Changes in strategic priorities of the partner organisation or CBM, which take away the relevance of the partnership.

- Achievement of programme outcomes.

- Partner's decision to opt out of the partnership.

If it is decided to exit the partnership an exit plan of typically no less than 6 months, and preferably with at least 1 year notice, will be developed. This does not apply to cases where immediate exit is required.

The aim of the exit plan will be to ensure a smooth closure of the partnership and to provide any additional support to the partner before CBM funding ends. Additional support could include:

- Support partners to identify areas where savings (cost recovery) could be made and potential sources of alternative funding identified.
- Support additional training (in-house or contracted) e.g. communication & fundraising, organisational and strategy development, programme design, financial management, audit, etc
- Offer to facilitate introductions, connections, access to other donors, etc
- Provide support on compliance and safeguarding, if applicable and needed.

Exit plans should consider both administrative and programmatic processes for the smooth transition, handover or phasing-out of CBM programmes and include information, such as:

- Approach to exit, roles and responsibilities
- Communication with stakeholders, as applicable
- Relevant donor requirements, if applicable
- Areas where support will be required, including additional training, to strengthen programme outcome and organisational performance
- Compliance and safeguarding areas
- Timeline and indicative budget

Discussions on exit should be conducted in a way that allow to maintain the relationship with organisations and key stakeholders, preserving entry points for future opportunities. Transparency, clear, open, honest and respectful communication, as well as mutual accountability and 'do no harm', are therefore key principles[3] underpinning discussions.

When possible, post-exit evaluations should be budgeted for and conducted after the exit process has been completed. Planning and budget for post-exit should be considered in the exit plan. Lessons-learnt and experiences with exit should also be captured. Questions that can be considered include:

- *'Have outcomes been sustained, expanded or improved after exit?*
- *Have approaches and activities been continued or changed?*
- *Have systems developed been changed or continued? Do they function effectively?'*[4]
- What has CBM learnt from this process? What would be done differently next time?

---

[3] Principles identified by participants during the Webinars on Partnership, Sustainability and Exit Learning Webinars organised in collaboration with INTRAC.
[4] Gardner, A. et al, What we know about Exit Strategies: practical guidance for developing exit strategies in the field, C-SAFE regional Learning Spaces Initiative, 2005

C. Mutual expectations, standards and strengthening of capacities

1. Mutual expectations and purpose of partnership

Partnerships are intended to be beneficial for both the partner and CBM. They will be based on a shared vision, complementarity of purpose and added-value towards the delivery of the country plan.

Mutual expectations, purpose and expected outcomes of the partnership, as well as standards and compliance requirements will be discussed with (prospective) partners at an early stage. In particular, the following will be considered:

- CBM's Programme Quality Framework and any standards from the organisation applicable to the partnership with CBM.

- CBM whistleblower system, feedback systems and CBM's safeguarding policy's section on working with partners

- CBM contractual, reporting and compliance requirements, as well as circumstances when a partnership might end

- Exit and sustainability considerations

This discussion can take place before or during the partner assessment and will be led in a way that allows the partner to share its own expectations, organisational standards, as well as good practices and/or support needs.

Active and critical dialogue with the partner will be maintained throughout the partnership. The partner will be proactively encouraged to provide feedback on CBM processes and the partnership.

2. Standards and contractual requirements

During partnership discussions, contractual requirements should be discussed with the partner before the contract is issued. The minimum requirements spelled out in our contract focus on compliance issues, which both CBM and partners must be accountable to.

In particular, the following standards and requirements should be highlighted:

- Compliance with sanctions frameworks
- Requirements in case sub-partners are contracted
- Financial and audit requirements
- Procurement requirements
- CBM Whistleblower system and feedback systems
- Safeguarding of children and adults-at-risk

It needs to be ensured that partners understand the contractual requirements and that they will be compliant with local law, rules and regulations, international law, rules and regulations especially including, but not limited to the sanctions according to the sanction lists kept by: The EU, Germany, UK, UN, USA and the local project country. In addition, it needs to be highlighted that requirements also apply to any of the partners sub-partners and service providers.

3. Organisational capacity development

Overall organisational development aims to improve the performance and adaptability of organisations (and the staff within) in a sustainable manner, by aligning the different areas of the organisation with

strategic priorities and resources available. Ownership by the partner's leadership and staff is key for effective organisational development. For this reason, capacity development needs will always be jointly discussed and agreed with the partner.

Capacity development activities will be based on the outcomes of the partner assessment. The first partner assessment establishes the baseline against which capacity development progress will be measured and facilitates a discussion on, for example:

- What needs to change to strengthen work and sustainability of the organisation?
- How will success look like? How to get there?
- What markers can be used to assess progress?

The monitoring of the partnership and partnership review (see section B5 and B6) provide an opportunity to monitor progress towards capacity development objectives, as well as to maintain a dialogue with the partner.

Expectations and support for capacity development will be balanced with the overall support provided by CBM and agreed purpose of the partnership. For example, a partner receiving LCDF funding is expected to be a strong partner and resources for capacity development of strategic partner should be prioritized.

4. Aim of capacity development activities

The aim of capacity development activities is to ensure that partners become more effective in delivering their work; and to strengthen the sustainability of the partners and programme outcomes.

Areas for capacity development could include:

1. Organisation: systems, processes and people's capacities e.g. strategy, governance (governing body, roles and responsibilities, management etc), policies, HR, sustainability (incl. income generation, cost recovery, etc), collaborations etc.
2. Finance: financial systems, financial viability, compliance with legal and financial requirements, financial accountability, policies, staff etc.
3. Programme: programme development, implementation, monitoring and evaluation, technical expertise (e.g. co-workers/staff, workshops, advisory visits etc), sustainability, safeguarding etc

Annex 3 identifies selected areas that contribute to develop strong organisations. This supports the prioritisation of areas for work after a complete PA is conducted, as well as monitoring of capacity development of partners.

Depending on the partner area of work and level of capacities, other areas to strengthen partner capacity might need to be considered. Guidance on additional areas that can be taken into consideration can be found in Annex 4.

Guidance will not be used as a prescribed approach. It will be used to orient discussions with partners and support prioritisation of activities.
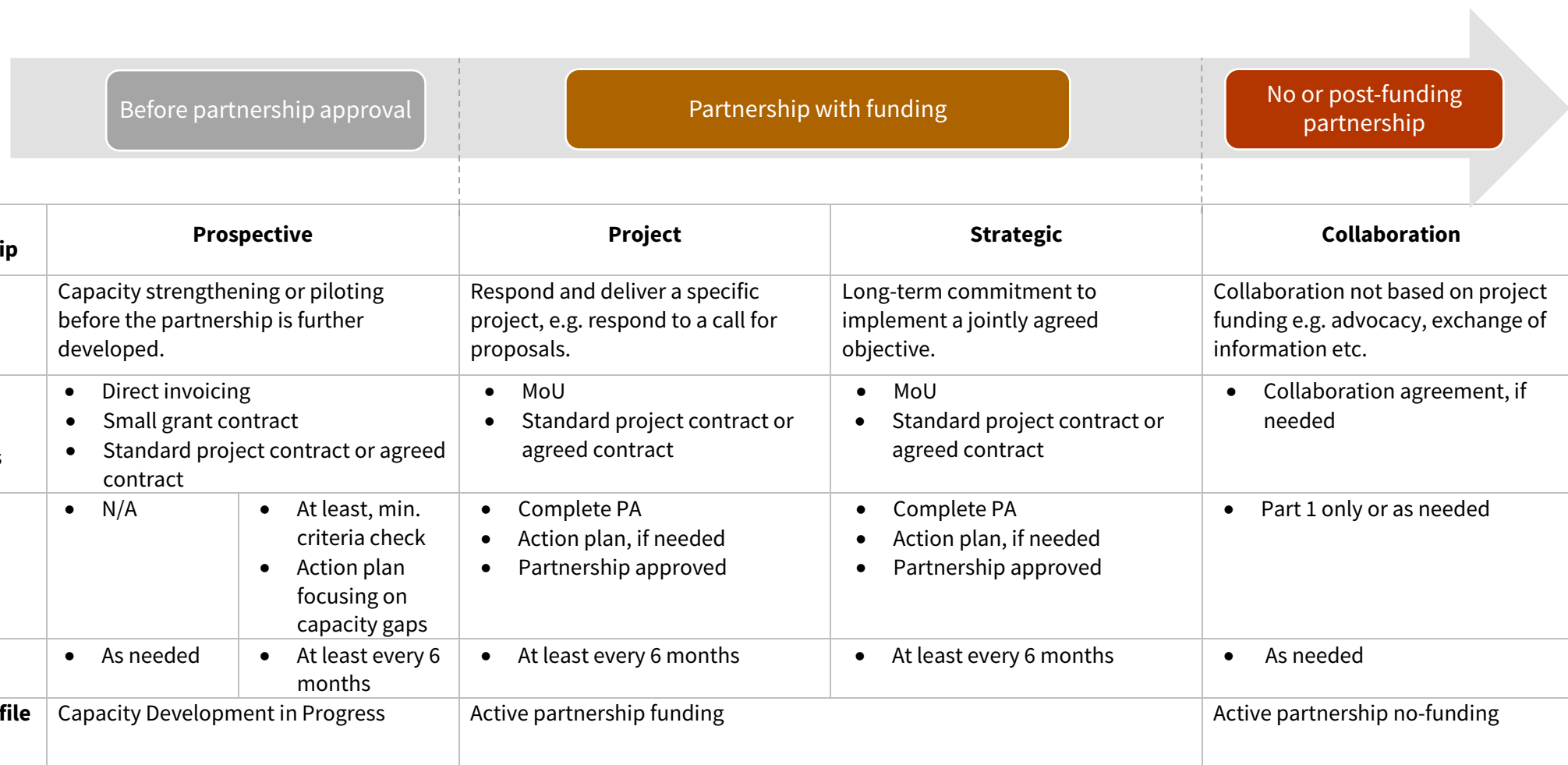
5. Delivery of capacity development activities

Capacity development activities are delivered by CBM CO staff and/or technical advisors. External advisors/consultants can support the delivery of activities if funding is available. Ideally, activities will contribute to cross learning, knowledge sharing and creation of synergies between the work of partners.

Capacity development activities will, whenever possible, be coordinated with other organisations funding the partner. For example, the CO can liaise directly with other donors or have a discussion with the partner on ongoing capacity development activities funded by others. The CO can also develop collaborations with other donors.

Partners with expertise and capacities can support the delivery of capacity development activities. For example, projects or activities can be developed to support peer-to-peer training, review, etc.

Annex 1: CBM Partnership pathway, partnership requirements and tools to support work

Before partnership approval	Partnership with funding	No or post-funding partnership

Type of partnership	Prospective		Project	Strategic	Collaboration
Purpose	Capacity strengthening or piloting before the partnership is further developed.		Respond and deliver a specific project, e.g. respond to a call for proposals.	Long-term commitment to implement a jointly agreed objective.	Collaboration not based on project funding e.g. advocacy, exchange of information etc.
Type of contracts & agreements	• Direct invoicing • Small grant contract • Standard project contract or agreed contract		• MoU • Standard project contract or agreed contract	• MoU • Standard project contract or agreed contract	• Collaboration agreement, if needed
Partner assessment	• N/A	• At least, min. criteria check • Action plan focusing on capacity gaps	• Complete PA • Action plan, if needed • Partnership approved	• Complete PA • Action plan, if needed • Partnership approved	• Part 1 only or as needed
Monitoring	• As needed	• At least every 6 months	• At least every 6 months	• At least every 6 months	• As needed
Partner profile status	Capacity Development in Progress		Active partnership funding		Active partnership no-funding

Annex 2: Examples of questions that can help guiding discussions on exit and sustainability.

The examples provided are intended to promote reflection; and should not be used as a check-list. (Adapted from Gardner, A. et al, What we know about Exit Strategies: practical guidance for developing exit strategies in the field, C-SAFE regional Learning Spaces Initiative, 2005)

Component	Key questions	Examples of activities to strengthen sustainability
1. What to sustain and why?	• What would we like to sustain? Why? • What determines when to exit (indicators)? What is the indicative timeline for exit? • How could activities be sustained after funding has ended? How will exit be implemented?	• Empowered partners able to continue activities • Sustained quality of services, attitudes and behaviours • Good working relationships with stakeholders • Achievement of project/ programme outcomes
2. What is needed to sustain outcomes? Which activities should be implemented to reach our (Exit) indicators?	Partnerships and local linkages: • What type of organisations should CBM partner with? • What will the partner bring to the partnership? What will CBM? • How will both CBM and the partner prepare for exit? Local organisational and human capacity: • What capacities exist? What additional capacities will be needed? • How will CBM and the partner measure capacity development? Local and external resources: • To what extent can services be sustained without external resources? • Which level of resources will be needed to maintain services? • To what extent are resources available locally? Who will provide the resources? CBM capacity: • Which resources can CBM mobilise? • Which (internal) capacity will CBM require? • How long will these resources and capacities be required?	• Identifying opportunities to raise the profile of the partner in relevant networks and facilitate introductions (including donors) • Support strengthening and broadening of partners' networks and (community) advocacy • Supporting the development of strategies for harnessing of local resources and identify potential for income generation and resource diversification • Support the development of communication strategies to raise the profile of the partner • Support strengthening of partners' organisational capacity (see partner assessment tool for areas that should be prioritised) and community development • Management of relationships/partnerships throughout, regular monitoring and review.
3. What are the expected needs after exit?	• What support will be needed after Exit? E.g. advice, technical assistance, linkages with other donors etc • How to maintain a relationship with organisations? E.g. involve organisations in advocacy activities, etc	• Continued technical support • Continue to attend partners meetings • Develop and implement joint advocacy campaigns
4. Assess Exit	• How will the Exit process be assessed? How will learnings be captured & shared?	

Annex 3: Definition of strong partners and monitoring of partner development

Definition of strong partner

CBM works with a broad range of partner organisations with different capacities. For this reason, strong partners are broadly **defined** as:

Organisations whose capacity exceeds the partner assessment minimum criteria and meet CBM contractual requirements. Strong partners are expected to continuously improve their capacities on governance & leadership, finance and programme, to excel in these domains and ensure that they fulfil their mandate over time in a sustainable manner.

The below table provides an overview of three levels of capacity to support prioritisation of capacity development activities with partners after the partner assessment has been completed. Three level of capacities are outlined:

Level 1 – capacity in place. Relates to the minimum criteria of the partner assessment. All capacity must be met for level 1.

Level 2 – strong partner. Relates to the criteria to attain of the partner assessment.

Level 3 – very strong partner. Relates to and goes beyond criteria of the partner assessment.

Linkages with PA criteria are identified. Sources of verification are identified in the PA tool. Table 3 identifies existing CBM tools and guidance that can be used to support the development of activities with the partner.

Each level builds on the previous criteria (i.e. level 2 does not repeat criteria identified in level 1, and level 3 assumes fulfilment of level 1 and 2). Partners do not need to be at the same level for all criteria at the same time. Capacity might only be partially met for level 2 and 3. All capacity must be met for level 1.

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
Governance and leadership (PA section I)			

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
Registration, governing document, legal & financial compliance (PA criteria 1.1, 1.9 and 2.4)	• Legal entity registered with an approving body responsible for the sector in the country. • Compliant with legal and financial requirements and regulations. • There are no open court cases (fiscal, legal or employee-related). • Positive endorsement and/or feedback by the authorities is documented and acted upon when needed	• A written governing document (e.g. constitution, bylaws etc) specifying the organisation purpose and a well-defined governance structure exists. • The document is updated regularly and allows the organisation to work in CBM areas of work.	• Fully compliant with legal registration requirements (e.g. renewal of permits and registration) • Fully compliant with national & local tax, social security, labour, occupational health and safety, and any other requirement.
Strategy (PA criteria 1.2; 1.14; 3.1-3.2)	• The organisation has a clear and shared understanding of its vision & mission spelled out in a strategic plan; or at least a stated purpose of existence and set of objectives. • Strategic priorities are relevant to and informed by the country	• A strategic plan/Business plan is aligned with vision and mission guides activities and decisions. • The Strategic Plan/Business Plan has been translated into a limited set of measurable performance targets that are regularly reviewed	• Strategy is based on a situational analysis and identified needs and resource available (or it is outline how additional resources will be secured) • Strategy allows to respond to changing environment

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
	development agenda and relevant sector strategies. • The organisation is committed to valuing, respecting and encouraging diversity, and seeks to be impartial and non-discriminatory in all activities.		• Measurable performance targets have been identified, implementation is supported by all stakeholders and performance is regularly reviewed.
Board & management *(PA criteria 1.4, 1.10-1.12)*	• Board operates on the basis of clear roles and responsibilities, in line with the governing body. • Board regularly provides strategic direction, oversight and holds management to account. • Board meets at least twice a year. Outcome of discussions and actions are documented. • The management of the organisation reports at least twice a year to the Board. • Management and leadership are not named in the on the	• Board membership includes a variety of expertise. Members are elected/nominated for a fix-term. • Board members are not related to each other and to management • Board & management roles and responsibilities are defined in Terms of Reference or similar document. • Board supports and provides oversight to management. Substantive feedback is provided by at least two members with different expertise every quarter.	• Independent and responsible to a wider membership (if applicable), defines performance targets for management (CEO) and periodically evaluates them • Open and transparent process for election/nomination of members for a fixed term and to remove Board members • Roles, responsibilities and fiduciary duties clearly understood and defined in Terms of Reference or similar document

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
	international sanctions lists or adversely mentioned in local judicial action.	• The governing body is legally liable for the actions of the organisation.	• Has the final responsibility for the approval of strategic plans, budgets, annual accounts, policies, etc • Provides strong support to the leadership and is engaged as a resource (e.g. fundraising activities) • Meets at least 4 times in year, meetings are systematically attended by all and are well documented • Board is periodically evaluated • Management has proven knowledge of the sector and management skills • Management provides direction and develop strategies that enable the organisation to attain its vision, mission

Characteristics	Level 1: Partner with capacity	Level 2: Strong partner	Level 3: Very strong partner
	(corresponds to the PA minimum criteria - red)	(corresponds to PA criteria to attain – green).	
			• Management style in in line with the purpose and values of the organisation • Mechanisms are in place to ensure accountability and transparency • Future leaders are developed, and succession plans are in place
Networks & Collaborations *(PA criteria 1.3, 1.15)*	• The organisation is an established and a visible part of the community or relevant network. • The organisation has strong linkages with other civil society groups and networks, as well as local authorities. • It is known and respected within the community and amongst its peer organisations.	• Strong understanding of programmatic local context reflected in the ability to mobilise and communicate with communities. • Partnerships with relevant groups, networks and stakeholders exist.	• Communicates and involves communities in the work of the organisation and it is perceived as responsive to input provided • Proactively monitors opportunities and implements activities to influence policy-making • Expertise from the organisation is recognized by policymakers and government officials and this is reflected in invitations to

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
			participate in expert groups, conferences etc.
People *(PA criteria 1.7, 1.13, 1.18)*	• The organisation has or is willing to develop within the first 6 months of its partnership with CBM a code of conduct/equivalent statement setting out its position as per the description in PA criteria 1.7 • The code of conduct is implemented and there is proven record that all staff and persons affiliated with the organisation have read, understand and signed the code of conduct. Staff has an induction at the beginning of employment and refresher trainings. • An organigram or similar document is available.	• Updated job descriptions are available for each position and performance appraisals are held at least once a year. • Updated policies are in place to avoid conflict of interest, address complaints and manage conflict. • Recruitment process is transparent (no conflict of interests), competitive (advertised in at least two outlets), inclusive and references are checked. • Terms and conditions of employment are compliant with national labour law, tax and social security requirements. • The organisation has policies that actively promote an accessible workplace and the recruitment of staff with disabilities	• Comprehensive HR Manual, personnel policies, recruitment and retention policies exits and are implemented • Key positions are filled and staff has the professional skills, knowledge and experience to fulfil its role. • Terms and conditions of employment allow to retain staff. • Budget is allocated to address any inclusion and accessibility issues that arise unplanned. • Mechanisms for managing and mitigating health, safety and security risks for personnel, programmes, property and assets are in place

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
Finance (PA section II)			
Financial system and controls *(PA criteria 2.5-2.8. 2.10 – 2.11, 2.13)*	• Proper books of accounts, which can be audited are maintained. • There is a valid supporting document for each income and expenditure transaction. • Basic accounting policies and procedures exist. • The organisation has adequate financing and reserves to cover its expenditure when they fall due. • The organisation can forecast cashflow into the future.	• An adequate financial system that easily tracks or produces income and expenditure reports per funding stream or source and budgeting monitoring reports is used • Checks and balances to safeguard the organizational assets and manage risks are in place • Finance manuals guiding finance operations are available and in use • Annual audit is conducted by an external certified audit firm • The organisation has a user friendly, reliable software that protects the integrity of the accounting data, is capable of generating the necessary accounting reports, and is operated by trained staff.	• The organisation is financially viable. Solid financial and operational plans are in place and are systematically used to make strategic decisions and manage operations. • Staff consistently adheres to documented policies and procedures. • Sound procurement system/capacities in place, with clear procedures and procurement records maintained. Procurement policy is available. • The organization has an effective annual budgeting process that reflects organizational needs and is broken down into cost center budgets.

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
			• Managers are held accountable to their area's budget. • The organisation has adequate financing and reserves to cover its expenditure • The organisation has the capacity to plan reinvestments from surpluses or the need to raise additional capital due to expected deficits. • Robust internal systems and controls exist to prevent fraud or embezzlement. They are integrated in all activities of the organisation. • The organisation has implemented an Anti-Corruption policy. • All fixed assets (eg vehicles, computers, equipment) are registered in the name of the organisation. The assets are

Characteristics	Level 1: Partner with capacity	Level 2: Strong partner	Level 3: Very strong partner
	(corresponds to the PA minimum criteria - red)	(corresponds to PA criteria to attain – green).	
			insured and controlled using a fixed assets register. The assets register is regularly updated. Annual inventory checks are carried out. Persons who carried out the check sign the register and put a date of the checks on it.
People *(PA criteria 2.2-2.7)*	• The organisation employs qualified finance staff and/or receives qualified finance services via an accredited accounting firm.	• The organisation has qualified accounting staff. Bachelor of Arts/Bachelor of Science or equivalent in accounting or finance required. • Staff has proficiency level in the use of the accounting software used • All staff receive the training and support they need to carry out their financial management responsibilities.	• The Finance staff has professional qualification (CA - Chartered Accountant, CPA – Certified Public Accountant, CAT - Certified Accounting Technician). • The finance manager/officer has a financial qualification with minimum 2 years work experience. • The organization has an effective, credible CFO (or a highly qualified Finance Manager) to oversee a Finance and Administrative team

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
			and externally audited financial statements.
Programme (PA section III)			
Implementation *(PA criteria 1.5, 1.14, 3.3, 3.5, 1.17)*	• The organisation is committed to seeking feedback/working with and supporting Disabled People's Organisations and to strengthening the voice of women, men, girls and boys with disabilities, in accordance with its vision and mission.	• Communities, DPOs and persons with disabilities are actively engaged in every stage of PCM, i.e. development, implementation and evaluation. • 85% of programmes are delivered according to planned objectives, results and outcomes; agreed budget and timelines, and technical standards. • Mechanisms for quality assurance and improvement are in place. • Lessons-learnt and feedback received is built into further project development. The organisation measures its impact and is able to effect change. • The organisation develops yearly plans and budgets for its operations	• Transparent and established feedback systems are in place. The organisation effectively responds to the feedback, with accessible reporting mechanisms so that any stakeholder affected by their work may hold them accountable and to ensure transparency. • Project implementation is always on track (in line with project plans and budget) and it is supported by internal expertise. Outcomes are in line with sector standards. • Communication strategies are developed to communicate outcomes to a broad range of stakeholders

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
		(or at least for its projects), and has the capacity to monitor them, as well as measure outcomes and conduct feedback.	
Reporting *(PA criteria 1.5, 1.14)*	• The organisation has the skills, knowledge and expertise to effectively implement, complete and maintain its projects, and can demonstrate past achievements.	• All narrative and financial reports are submitted by agreed deadlines and with limited need to follow-up.	• High-quality financial and narrative reports are always submitted within agreed timelines without any need to follow-up. • Demonstrated evidence of reports being analysed and used in decision making.
Expertise	Guidance from the Initiative teams will be used to assess level of expertise. Initiative teams will be involved in the assessment of technical capacity.		
Resource Mobilisation & diversification *(PA criteria 3.7)*		• Business/Fundraising/Resource mobilization strategy developed and progress in implementation is according to plan.	• The organisation has a proven track record of successful fundraising from a variety of donors and of drawing on local resources and local economies, where applicable.

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
		• At least 75% of overall budget comes from other support/donors other than CBM. • Exit strategies and/or phase out plans have been developed during project planning to maintain activities after donor support is phased-out.	• Cost recovery policies are in place. • Board members are involved inf fundraising efforts • Significant expertise in in income generation is available within the organisation or management has access to external expertise
Safeguarding (PA criteria 3.4)	• Stand-alone Safeguarding policy developed or safeguards have been integrated into other organisational policies and manual (e.g. HR manual, volunteer policy etc). This has been approved by the relevant management body. • All staff and associates are required to adhere.	• The safeguarding policy/procedures is fit for purpose in terms of content (explicitly preventing and responding to all forms of physical, sexual and emotional abuse, neglect and exploitation) and seeks to safeguard the right target group (e.g both children and adults-at-risk when both groups interface with the organisation). • Safeguarding training/refresher opportunities are made available to all staff and associates at least once a	• The organisation has a safeguarding action plan, which helps management to oversee the implementation of the safeguarding policy. This action plan is monitored at last least once a year and lessons-learnt are discussed with staff and feed into work. • 100% of staff and representatives like volunteers, board members... undergo a safeguarding refresher or

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
		year (about 80% attendance is registered). • Safeguarding risks are examined and actively mitigated. This is reviewed at least once a year. • There is an officially assigned safeguarding focal person whose duties are clear. • The organisation has a feedback and complaints/compliments system in place. • There is a documented way for safeguarding incidents to be reported and responded to.	training/presentation at least once a year • The organisation's management ensures that a safeguarding risk assessment has been conducted and major risks are mitigated. This is monitored and reviewed at least once a year. • The feedback and complaints/compliments systems are being used and issues arising are addressed within the timeframes committed to. • The safeguarding focal person is trained and receives the necessary support (e.g protection from reprisal, budgetary allocation where needed...)

Characteristics	Level 1: Partner with capacity (corresponds to the PA minimum criteria - red)	Level 2: Strong partner (corresponds to PA criteria to attain – green).	Level 3: Very strong partner
			• The organisation actively budgets for safeguarding or makes funds available for safeguarding when need arises. • The organisation supports partners/collaborators/ referral points who are weaker in safeguarding to strengthen their safeguarding policies and or procedures. • The organisation actively informs its clients and partners about its safeguarding policies and procedures. • The major incidents from the feedback mechanism and safeguarding incidents are reported to the board at least annually.

Annex 4: Guidance on additional criteria for partners with strong capacities

For partners with a good level of capacity, other areas of the work and systems of the organisation might need to be considered in order to monitor the partner development. This table identifies additional areas that can be taken into consideration.

This list was developed by the AFE Regional Hub. In case of queries, please contact the AFE Regional Programme Manager (florah.mukabana@cbm.org).

Domain	Characteristics
Governance & Leadership/ Organizational Development	- Governance/Board: quality of oversight at organization - Mission, Vision and Strategy: Appropriate vision and mission, and a Strategic Plan exists and guides decisions. - Mission Awareness: The management has operationalize the mission - Finance and administration systems: quality of organization's financial processes and systems - Systems and infrastructure: The quality of the organization's processes, systems and physical assets - External relationships: Has strong, positive relationships with key stakeholders (community, government and clients)
Finance	- Finance management: Established and documented process for budgeting, forecasting, cash flow, reporting and strong internal controls to protect staff, safeguard assets, ensure accounting records are accurate and up to date, prevent fraud or embezzlement - Cost recovery rate: The organisation has ability to cover costs and build reserves - Defensive interval: the organisation has ability to cover number of months' ongoing expenses w/ liquid assets (Cash + Short-Term Investments + Receivables) / Average Monthly Expenses - Funding concentration percentage: The extent to which organization is dependent on single source and not diversified (3-year Average Revenue from Single Largest Client or Donor / 3-year Average Total Revenue) - Funding Stream Diversification: No of diversification of income sources (Number of different funding sources, including types of donors and revenue-generating services) - Revenue Growth Rate: The organization is meeting market demand and expand client base

	- Revenue/Client Contacts Growth Rate *(Client Contact version only):* The organization is cross-selling additional services: - Services Revenue Percentage: The organization is independently generating revenue - Overhead Rate: The organisation is efficient in providing services (Indirect Costs / Direct Costs) - Resource diversification: Business Strategy for resource mobilization or fundraising developed and implemented.
Programme	- Client*/Services growth rate: The organization has been able to expand its client base- Annualized growth in client contacts* or services per year for past 3 years - Human Resources: The organization is effectively using human resources: (Average total services per month for last 12 months'/ Average number of FTE personnel for last 12 months) - Access: The organization to address access needs of clients - Average score of clients responses on price, location, hours - Wait time: Measures ability of organization to serve clients efficiently- Average minutes clients waited before being served on last visit - Client satisfaction: Measures ability of organization to meet client needs - Average overall client satisfaction and likelihood to recommend services to friends and family - Incident Management & Preparedness: The organization has ability to manage legal and security incidents-organizational preparedness and response protocol - The organisation has put in place proper Infrastructure & Physical Security that provides a safe environment to staff and clients-C19 etc - Access to Competent Legal Services: Measures ability of organization to remain knowledgeable of and defend the organization within the country's legal framework - Proactive linkages with advocacy: The organization has built strategic relationships for advocacy - Human resources: Organisation has quality of management and staff; and has ability to recruit, train and retain talent - Satisfaction: the organization has ability to effectively use and retain talent

	• Management and performance culture: The organization has put in place a performance-based culture • Commitment and ownership: organization has created loyalty and responsibility among staff

Annex 5: List of PA criteria and support documents and tools available

The below table is part of the Standard Operating Procedure. If endorsed by SteerCO, it will be added to the Guidance note on Partner and Partnership development.

This table provides guidance on existing CBM tools and documents ('Tools available') that can be used to support the development of activities with the partner to ensure that progress is made in attaining CBM Standards.

Criteria	Evidence/Tools available
I. GOVERNANCE AND LEADERSHIP SECTION	
1.1 The organisation is registered.	
1.2 The vision & mission of the organisation guides its work and is used to set priorities.	
1.3 The organisation collaborates with other relevant stakeholders and has good standing at community, district and local/government levels.	
1.4 The organisation has a functioning governing body that meets regularly.	
1.5 The organisation has a track record of successful work and can articulate and demonstrate achievements.	
1.6 The organisation's board/leadership is aware of and supportive of the partnership with CBM.	
1.7 The organisation has a code of conduct/equivalent statement, or is committed to developing one where this is absent, setting out its position on all forms of unacceptable conduct and actively promotes its adoption by staff.	• CBM Code of Conduct
1.8 The organisation, its leadership and management, is not named on the international sanctions lists or adversely mentioned in local judicial action.	• EU, UK, US Office of Foreign Assets Control (OFAC) and UN sanctions list
1.9 The organisation has a written constitution/trust deed/bylaws or other governing document specifying its purpose and governance structure.	
1.10 The governing body (e.g. Board) is independent and is appointed by, and responsible to, a wider membership	

Criteria	Evidence/Tools available
1.11 The management of the organisation reports regularly to the board/governing body.	
1.12 The board has the final responsibility for the approval of strategic plans, budgets, annual accounts etc.	
1.13 The organisation has clear policies on inclusive employment and gender equality.	• Inclusive HR Policy • DID Toolkit 2
1.14 The organisation has capacity to document outcomes and articulate achievements of its projects	•
1.15 The organisation strives to uphold a professional basis for health, safety and security of staff.	• Country information template • Security Policy
1.16 The organisation has implemented a feedback/complaints system and effectively responds to feedback, with accessible reporting mechanisms so that any stakeholder affected by their work may hold them accountable and to ensure transparency.	
II. FINANCE SECTION Compliance checklist	
2.1 The organisation has a sufficient financial system to meet requirements for internal control and financial reporting.	• Accounting Policy – Information for ongoing and prospective partners
2.2 The organisation has access to qualified finance staff.	
2.3 The organisation has adequate financing and reserves to cover its expenditure when they fall due.	• Most recent Partner Audit Reports and Management Accounts (reserves should be positive, cash held should be enough to cover current liabilities as a minimum)
2.4 The organisation complies with national tax, social security, and other legal requirements.	• Check country legal requirements with the relevant CBM country/regional office.
2.5 The organisation can forecast cashflow into the future.	• RO/CO Finance Handbook Chapter 18.2
2.6 The organisation has a comprehensive double-entry financial system in place to meet internal control requirements and financial reporting.	• Accounting Policy – Information for ongoing and prospective partners
2.7 The organisations employs staff who are responsible for finances, with adequate financial qualifications and experience.	

Criteria	Evidence/Tools available
2.8 The organisation is financially viable (the criteria builds on the minimum criteria 2.3 and identifies areas that should be attained).	• Most recent Partner Audit Reports and Management Accounts (reserves should be positive, cash held should be enough to cover current liabilities as a minimum) • Cashflow forecasts
2.9 An adequate procurement system is in place.	• RO/CO Finance Handbook Chapter 22.3 and 22.4 • Minimum requirements for a partner are stated in the Project Contract Section 3.
2.10 The organisation has a well-established process for budgeting, forecasting, cash flow management and reporting.	
2.11 The organisation has a valid user friendly and reliable accounting software.	• Accounting Policy – Information for ongoing and prospective partners
2.12 The organisation has implemented an Anti-Corruption policy.	• Policy on prevention of Corruption and Fraud
2.13 The organisation has a comprehensive fixed assets register in place.	• Accounting Policy – Information for ongoing and prospective partners
2.14 The organisation has a grant management system.	• Accounting Policy – Information for ongoing and prospective partners

III. PROGRAMME SECTION

Inclusive Eye Health Quality Management Framework

Ending the neglect to attain the Sustainable Development Goals: A road map for neglected tropical diseases 2021–2030

Criteria	Evidence/Tools available
3.1 The work of the organisation is relevant to and informed by the country development agenda.	• OHCHR / CRPD training manual
3.2 The organisation is committed to valuing, respecting and encouraging diversity, and seeks to be impartial and non-discriminatory in all activities.	• Inclusive HR Policy • DID Toolkit • Updated DID policy • Programme Quality Framework
3.3 The organisation is committed to seeking feedback/working with and supporting Disabled People's Organisations and to strengthening the voice of women, men, girls and boys with disabilities, in accordance with its vision and mission.	• DPO engagement and mapping tools • Programme Quality Framework
3.4 The organisation is committed to the safeguarding of the children and adults-at-risk it works with so that they do not face abuse, neglect	• CBM's children and adults at risk Safeguarding Policy • KCS standards 2014 • Understanding Child Safeguarding (KCS 2014) • KCS Child safeguarding audit template

Criteria	Evidence/Tools available
or exploitation through the organisation's people, programs or operations.	• CHS Alliance investigation guidelines. • CRPD training • Health, safety, security and travel guides available • Programme Quality Framework • CBM Safeguarding Risk management guide 2019 • CBM Safeguarding assessment questions for Education institutions 2016.
3.5 The organisations follows a iPCM (inclusive project cycle management) approach to its projects.	• iPCM manual • Practical ways of building inclusive project cycle management • Inclusion made easy • Programme Quality Framework • CBM Safeguarding Risk Management Guide 2019
3.6 The organisation is committed to rights and equality for women, men, girls and boys in all its programmes, ensuring equal value, participation and decision making by all.	• Programme Quality Framework
3.7 The organisation has the capacity to manage, deliver and maintain its projects and activities without dependency on one funding source.	• Programme Quality Framework
3.8 The organisation's programmes and operations are progressing towards being fully accessible in line with the principles of universal design.	• CBM Policy on Accessibility • Programme Quality Framework
3.9 The organisation has mechanisms and resources in place to manage risks that might impact the organisation and the implementation of project activities.	• CBM Safeguarding Risk Management Guide, 2019.
3.10 The organisation has the experience and capacity to manage and support sub-contracted parties.	
3.11 The organisation is committed to assessing and avoiding potential negative impact on the environment and seeking opportunities to enhance environmental sustainability in its operations and programmes, when possible.	• Environmental Sustainability Guidelines (under development)

Annex 6: Available tools and guidance to support work with partners

- CBM Partnership Principles and Programme Quality Framework

- Partner assessment tool: identifies areas of the organisation that determine capacity. Definition of criteria provides guidance on areas to strengthen capacity. Identifies objective of the partnership and includes an action plan.

- Partnership, Sustainability and Exit learning webinar: Organised in collaboration with INTRAC and includes presentations from Oxfam, WWF and Leprosy Mission International

- GTM on Partnership principles – what it means to our work and the partner assessment. An example of how the PA was used to develop the capacity of a partner organisation is provided.

- Partnership learning paper phase 1 to 3 and Partnership learning paper phase 4 to 6. Summarises learnings and feedback from presenters and participants in the online sessions dedicated to the Partnership Process.

In addition, technical check-lists, templates and guidance for safeguarding and accessibility audits have been developed by staff responsible for these areas of work.