Welcome to the Bond Health Check!

This offline version of the Health Check is intended to help you understand what is covered by the tool, which parts may be most relevant to your organisation and who may be best placed to participate in the Health Check exercise.

The Health Check covers 11 pillars related to core functions found in most organisations. To measure effectiveness against each pillar, there are a number of associated indicators. For each indicator there are five descriptive statements describing progressive improvement, from which your organisation's score is derived. Participants are invited to select the level that they believe most accords with current practice in their organisation and there is space to record comments or supporting evidence to justify their choice at the end of each indicator.

It is not necessary to complete every pillar: you can choose a selection of areas that are most relevant and useful to your organisation.

Using the Health Check online with Bond enables you to have instant access to analysis and visualisation of your results, and to compare your results to other organisations completed the Health Check.

Pillar 1: Identity and integrity

1. Shared values and vision

1	We each have our own understanding of our organisation's core values and vision.
2	Our leadership has a shared understanding of our organisation's core values and vision. Amongst others, our values and vision are sometimes unclear.
3	Our leadership and the majority of our staff have a shared understanding and identify with our organisation's core values and vision, and can explain them to others.
4	We all have a shared understanding and strongly identify with our organisation's core values and vision and can explain them to others. For most of us the connection is usually clear between our values and vision and what the organisation does and how it does it.
5	We all have a shared understanding and strongly identify with our organisation's core values and vision and can explain the connection between them and our individual roles. We are confident that the organisation's decisions and actions are always consistent with our values and vision, and can give examples of this to others.

ANY COMMENTS OR SUPPORTING EVIDENCE:

2. Distinctive Contribution

1	We are unclear of the distinctive contribution our organisation makes in our area of work.
2	Our leadership has a shared understanding of the distinctive contribution our organisation makes in our area of work. Amongst others our distinctive contribution is sometimes unclear.
3	Our leadership and the majority of staff have a shared understanding of the distinctive contribution our organisation makes in our area of work and can explain this to others.
4	We have a widely shared understanding of the distinctive contribution our organisation makes in our area of work. We can demonstrate that this forms the basis for most of our activities.
5	We have a clear, detailed and widely shared understanding of the distinctive contribution our organisation makes in our area of work. We can demonstrate that this forms the basis for all of our activities. External stakeholders want to work with us because of our distinctive contribution.
ANY COMMENTS OR SUPPORTING EVIDENCE:	

3. Transparency

1	We make information available to those who ask but we do not proactively publish consistent information about our organisation and its activities.
2	We publish a basic level of information about our organisation and its activities through our website.
3	We publish a selection of information about our organisation, its activities and its results through our website and other channels, but we do not have an organisation wide approach to transparency.
4	We have an organisation wide approach to and policies on transparency and publish the majority of information about our organisation, its activities, finances and its results in a coherent and consistent way through our webiste and other channels. Some of this data is published in an International Aid Transparency Initiative (IATI) compliant format.
5	We have an organisation wide approach to and policies on transparency and publish all information about our organisation, its activities, finances and its results in a coherent and consistent way through our website and other channels. The majority of this data is published in an International Aid Transparency Initiative (IATI) compliant format. We are recognised leaders in transparency and in using open data to engage with our stakeholders.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Partnership

1	We have mixed understandings within our organisation of why and how we work with partners in the South. We only seek their views on the project activities they are involved in.
2	Some staff have an understanding of why and how we work with partners in the South. Amongst others this is unclear. We are looking at ways in which we can reflect partner's views in the development of our strategies and policies as well as project activities.
3	The majority of our staff have a shared understanding of why and how we work with partners in the South. This understanding is consistent across most of our activities. We try to ensure the views of partners are reflected in the development of our strategies and policies as well as project activities.
4	We have a clear and widely shared understanding at all levels of our organisation of why and how we work with partners in the South. This understanding is consistent across all activities and our external communications. Partners views are reflected in project activities, the development of our strategies, policies and in our governance.
5	We have a clear and widely shared understanding at all levels of our organisation, including the Board, of why and how we work with partners in the South. This understanding is consistent across all activities and our external communications. We have processes for ensuring partners views are reflected in project activities, the development of strategy and policy and in our governance and we can show how they influence our thinking and decisions at all levels.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Beneficiary voice

1	Beneficiaries are informed of decisions at project level. We have not considered how to reflect their views in higher level decision making.
2	Beneficiaries are sometimes consulted on decisions at project level. We are starting to think of ways in which we can reflect beneficiary views in the development of our strategies and policies.
3	Beneficiaries are always consulted on project level decisions, and we try to ensure their views are reflected in the development of our strategies and policies.
4	Beneficiaries are involved in project level decisions, and their views are reflected in the development of our strategies, policies and governance.
5	We can demonstrate how the views of beneficiaries are reflected at all levels of our organisation in projects in the development of our strategies, policies and in our governance and we can show how their views consistently influence our thinking and decisions.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 2: Leadership and strategy

1. Developing strategy

1	Our work is determined more by reacting to opportunities that arise than from a clearly articulated strategic direction.
2	We are developing an overall strategic direction for the future of the organisation in consultation with staff, but it is still not clearly articulated.
3	We have a strategy that is grounded in an understanding of the external environment and builds on our distinctive contribution. It is translated into an operational plan. Staff were consulted in the development of the strategy and it guides decision making.
4	Our strategy presents a path towards achieving our mission. It is grounded in strategic choices around where we will focus resources, an understanding of our external environment, and builds on our organisation's distinctive contribution. It is translated into an operational plan with shorter terms goals. Our strategy is collectively owned by staff and guides our day to day work and decisions.
5	Our strategy presents a clear and realistic path towards achieving our mission. It is grounded in clear strategic choices around where we will focus resources, an understanding of the external environment and how we think change happens, past learning (e.g. evaluations), and builds on our organisation's distinctive contribution. It is translated into an achievable operational plan with clear shorter term goals. Our strategy is collectively owned by staff and inspires and directs our day to day work and decisions.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Monitoring strategy

1	We do not systematically monitor our progress at a strategic level.
2	We try to monitor our progress at a strategic level, but mainly collect data on the activities we have undertaken rather than the outcomes which we have achieved.
3	We have process (activity) indicators and targets in place for monitoring progress against our strategy, but data collection and analysis is not systematic. We sometimes use the data we collect to adjust our strategy.
4	We have output and outcome indicators and targets in place for monitoring progress against most parts of our strategy. We collect and review this data and make adjustments to our strategy when necessary.
5	We have clear output and outcome indicators and targets in place for monitoring progress against all parts of our strategy. We systematically collect and collate this data along with other results data such as evaluation reports, periodically review it and make adjustments to our strategy when necessary.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Strong governance

1	We have a governing body but it does not yet play an active role in facilitating strategic direction, or fully providing oversight on matters brought to its attention by the executive.
2	We have a governing body that is starting to take a more proactive role in facilitating strategic direction and responds as necessary to matters brought to its attention by the executive.
3	We have a committed governing body that provides strategic direction, fulfils its principal governance responsibilities and effectively responds to matters brought to its attention by the executive.
4	We have a committed and effective governing body. Working well as a team, it provides strategic oversight, monitors our overall effectiveness, and reviews its own performance. Board members try to promote our organisation externally.
5	We have a committed, proactive and highly effective governing body. Working well as a team it ensures delivery of our mission, provides strategic oversight, monitors our overall effectiveness, holds the executive to account, and regularly reviews its own performance. Board members are well connected and successfully promote our organisation externally.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Diverse governance

1	Our governing body is drawn from a narrow demographic and does not yet have the necessary mix of skills, experiences and perspectives to govern effectively.
2	Our governing body has a mix of people but still has some critical gaps in skills, experiences and perspectives.
3	Our governing body has a few gaps but overall has a good mix of people, representing a range of skills, experience and perspectives.
4	Our governing body has a strong mix of skills, experiences and perspectives. We conduct audits to identify existing skills gaps that need addressing.
5	Our governing body has an excellent mix of skills and experiences and perspectives and is appropriately representative of our different stakeholders. We conduct regular audits to identify existing and future gaps that need addressing.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Inspiring leadership

1	Our leader (CEO, Executive Director etc.) provides a general direction for our organisation.

2	Leadership is provided mainly by one individual (CEO, Executive Director etc.) with support from our governing body. They are passionate and have a strong commitment to our organisational mission.
3	Senior managers are part of a team that, under the guidance of the leader (CEO, Executive Director etc.), provides the main direction and drive in our organisation. They are supported by the governing body, are passionate and have a strong commitment to our organisational mission.
4	Our leadership (leader, senior management team and governing body) are passionate and committed to our mission. They provide strategic direction and drive in our organisation. They regularly delegate responsibilities to and develop the leadership skills of others in the organisation.
5	Our leadership (leader, senior management team and governing body) inspire and motivate through their passion, vision and commitment to our mission. They provide a clear strategic direction and drive in our organisation. They promote and support a culture of shared responsibility, decision making and initiative-taking at all levels of our organisation.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 3: Partners

1. Selection

1	Our partnerships exist due to historical or personal links and their geographical location.
2	We have a basic checklist of things we look for in our partners which we use to make sure they can implement our projects.
3	We have an assessment process for choosing our partners which helps ensure that our choice of partners fits in with our strategy. We sometimes seek out the perspectives of others (CSOs, beneficiaries, government etc.) as part of the assessment process to help inform our decision.
4	We have an assessment process for choosing our partners which we use consistently to ensure that our choice of partners fits in with our strategy. We regularly obtain the perspectives of others (CSOs, beneficiaries, government etc.) as part of the assessment process to ensure an informed decision is made. We offer some opportunities for potential partners to better understand and assess if they wish to partner with us.
5	We take a strategic approach to choosing partners, systematically mapping and identifying our needs and those of our partners and ensuring a good fit. We always obtain a wide range of perspectives (CSOs, beneficiaries, government etc.) as part of the assessment process to ensure an informed decision is made. We approach the process as a mutual assessment of each other and discuss the potential benefits and risks of the partnership.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Shared Values

1	Our partnerships exist due to partners sharing our goal to fight poverty and their geographical location.
2	We identify the key shared objectives we look for in our partners and the benefits our partners can bring to our projects.
3	We and our partners share a commitment to some key values and objectives. We recognise the benefits our partners bring to our projects and organisation and some of the benefits we bring to theirs.
4	We and our partners have a shared vision, values and objectives. We recognise the benefits our partners bring to our projects and organisation and the benefits we bring to theirs. We identify how we can build on each others' respective strengths.
5	We and our partners have a shared vision, values and objectives. We recognise the benefits and learning our partners bring to our projects and organisation and the benefits we will bring to theirs. All of our partnerships build on our and our partners' respective strengths. The added value of working together is always clear and recognised by us both.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Roles and responsibilities

1	We have agreements with our partners that detail their responsibilities for delivering contracted project activities.
2	We have a standard programme agreement which we use with our partners that sets out the responsibilities of each side in relation to the contracted project activities.
3	We have agreements for all of our partnerships which set out the rights and responsibilities of each side in relation to the contracted programme activities and the functioning of the partnership.
4	We have an organisation-wide approach to working with partners (e.g. partnership policy/principles) and agreements for all of our partnerships which set out the rights and responsibilities of each side in relation to the contracted project activities and the functioning of the partnership.
5	We have an organisation-wide approach to working with partners (e.g. partnership policy/principles) and mutually-owned agreements for all of our partnerships which set out the rights and responsibilities of each side in relation to the contracted project activities and the functioning of the partnership. Our agreements are always balanced in what they require of each side.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Monitoring partnerships

1	We monitor our partners to ensure they are implementing projects as we agreed. We do not monitor the quality of our relationships with partners.
2	We monitor our partners to ensure they are implementing projects as agreed and sometimes use this opportunity to discuss the quality of our relationships with partners.
3	We monitor and review our partners' projects and the quality of our relationships with partners. We see this as an important opportunity to discuss how our relationships with partners are working and identify what we can improve.
4	We have a structured way of regularly monitoring and reviewing partners' projects and the quality of our relationships with partners that has been jointly agreed with them. Both we and our partners see this as an important opportunity to discuss how our relationship is working and jointly identify what we can improve. We always act on the outcomes.
5	We have a systematic way of working jointly with partners to monitor and review projects and the quality of our relationship. Both we and our partners are deeply committed to improving the quality of our relationships and always make adequate time and resources available for this. We track the quality of our partnerships across our organisation (e.g. through a partner survey) and use this data to assess and improve our overall effectiveness as a partner organisation.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Staff Capacity

	We recognise the importance of good partner relations, but we have not yet identified the specific staff skills and knowledge needed to facilitate this.
	We have identified the necessary skills and knowledge needed to manage partner relationships, and are looking at ways of building staff capacity.
	Some staff have the necessary skills and knowledge needed to manage high quality partner relationships. They have knowledge of a range of tools and practices for managing conflict, building trust, ensuring openness etc.
	Most relevant staff are skilled at managing high quality partner relationships and use a range of tools and practices for managing conflict, building trust, ensuring openness etc. We have integrated managing partner relationships into relevant staff performance reviews.
	All relevant staff are highly skilled at managing high quality partner relationships and use a range of tools and practices for managing conflict, building trust, ensuring openness etc. They are able to consistently demonstrate through their performance reviews the actions they have taken to create open and trusting relationships with partners.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Staff continuity

1	Sometimes changes in our staff disrupt our relationships with partners. We have no process for managing a smooth transition between staff.
2	We recognise the need for and are taking active steps to prevent changes in our staff disrupting our relationships with partners.
3	We manage staff changes using handovers and debriefings to minimise disruption to our relationships with partners. There are occasionally some problems.
4	We consistently manage staff changes through a combination of handover and debriefing processes, strong teamwork and documentation of knowledge to prevent disruption to our relationships with partners.
5	We always manage staff changes through a combination of handover and debriefing processes, strong teamwork and systematic documentation of knowledge to prevent disruption to our relationships with partners. We are recognised by partners for doing this effectively.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Capacity development

1	We usually select partners that are able to undertake our project activities and rarely support capacity development.
2	Our approach to capacity development tends to be a one-way process. We identify what capacity needs our partners have and suggest a capacity development plan for them that relates primarily to the implementation of the project activities.
3	We and our partners jointly assess their capacity needs and design and implement an appropriate capacity development plan. We provide capacity building to enable better implementation of project activities, but also regularly respond to the wider organisational needs and priorities of our partners. Progress is regularly monitored.
4	We and our partners jointly assess their capacity needs and design and implement an appropriate capacity development plan. Progress is regularly monitored and the plan is regularly updated. We are learning which approaches to capacity development are most successful. We sometimes look to see what we can learn from partners and how they can build our capacity.
5	Partners take the lead assessing their capacity needs and designing and implementing an appropriate capacity development plan. They identify where and how we can best provide support and identify other organisations that can provide the support we don't have the specialist resources to provide. Progress is regularly monitored by partners and the plan is regularly updated. We have evidence that our capacity support is leading to stronger organisations that can deliver better results. We proactively identify specific areas where we can learn from partners and how they can build our capacity.

ANY COMMENTS OR SUPPORTING EVIDENCE

8. Partner sustainability

1	We only have short term, project-based partnerships which end with donor funding. We do not discuss with our partners their sustainability beyond project funding.
2	We engage mainly in short term partnerships along with a limited number of long term partners. We are beginning to discuss how we can contribute to helping our long term partners' move towards sustainability.
3	We engage in a balance of short term and long term partnerships. At the outset of a project we discuss how we can contribute to helping most of our long term partners move towards sustainability.
4	We are committed to helping partners move towards sustainability and this commitment is clearly outlined in our partnership policy/principles. We discuss this at the outset of a project with all partners. We and our partners have a shared vision for how the partnership will evolve over time.
5	We are committed to investing in the long term sustainability of our partners and this commitment is clearly outlined in our partnership policy/principles. Discussions on how we can contribute to helping partners move towards sustainability are prioritised at the outset of the project and followed through during the lifetime of the partnership. We and our partners have a shared vision for how the partnerships will evolve over time.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 4: Beneficiaries

1. Transparency

1	We make limited project information available to beneficiaries and usually only when it is requested.
2	We sometimes ask beneficiaries what information they need in order to effectively participate in the project, and we try to make this information available to them.
3	We regularly ask beneficiaries what information they need in order to effectively participate in the project and would like to know about our organisation, and this is made available to them.
4	We always ask beneficiaries what information they need in order to effectively participate in the project and would like to know about our organisation and this is made available to them. We are working with beneficiaries to identify how to communicate the information in the most accessible ways given their context.
5	We systematically ask beneficiaries what information they need in order to effectively participate in the project and would like to know about our organisation, and this is made available to them in forms that are easily accessible to them given their context. Particular consideration is taken to ensure the most marginalised are able to access this information. We always check that the information is understood and provide clarification

	when asked.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Participation

1	We inform beneficiaries of our plans and decisions at different stages of the project cycle (planning, implementation and monitoring, evaluation)
2	We sometimes consult with beneficiaries at different stages of the project cycle (planning, implementation and monitoring, evaluation). We use their views to inform our plans and decisions.
3	We always consult beneficiaries throughout the project cycle (planning, implementation and monitoring, evaluation). We use their views to inform our plans and decisions.
4	We work jointly with beneficiaries, including the most marginalised, throughout the project cycle (planning, implementation and monitoring, evaluation). Plans and decisions are always made jointly.
5	We support beneficiaries to take the lead throughout the project cycle (planning, implementation and monitoring, evaluation). Beneficiaries make the plans and decisions. We are confident that the work we are supporting reflects the priorities of the most marginalised.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Feedback

1	We rarely ask beneficiaries for their feedback on our work.
2	We make opportunities to hear feedback and complaints from beneficiaries, but do not always provide a response and explain any action we have taken.
3	We actively encourage beneficiaries to give us feedback and make complaints and we always provide a response and explain any action we have taken. We use feedback from beneficiaries to improve our work.
4	We systematically collect, record and respond to feedback from beneficiaries. We use a range of mechanisms for collecting feedback and complaints, and have ways of protecting the confidentiality of beneficiaries where appropriate. We have evidence of feedback from beneficiaries being used to improve our work.
5	We systematically collect, record and respond to feedback and complaints from beneficiaries, including the most marginalised. We use a range of contextually appropriate mechanisms for collecting feedback and complaints, and have ways of protecting the confidentiality of beneficiaries where appropriate. We have evidence of feedback from beneficiaries being used to improve our work. We use feedback data (e.g. beneficiary satisfaction levels, number of complaints) to monitor and compare effectiveness across our projects.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Staff Capacity

1	We recognise the importance of beneficiary participation and feedback, but we have not yet identified the skills and competencies necessary to facilitate this.
2	We have identified the skills and competencies necessary to facilitate beneficiary participation and feedback and are looking at ways to build the capacity of relevant staff to use participatory tools and approaches.
3	Some staff have the necessary skills and competencies to facilitate beneficiary participation and feedback. They understand a range of participatory tools and approaches.
4	All relevant staff are skilled facilitators of beneficiary participation and feedback and use a range of tools and approaches. We have integrated responding to beneficiary feedback into the performance reviews of relevant staff.
5	All relevant staff are highly skilled facilitators of beneficiary participation and feedback and use a range of appropriate tools and approaches. They are able to consistently demonstrate through their performance reviews how beneficiary participation and feedback has shaped their decisions and actions.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 5: Programmes

1. Identification

1	Our projects are developed based on our perceptions of the needs of partners and beneficiaries.
2	Our projects are based on our local knowledge and informal discussions with partners and beneficiaries.
3	Most of our projects are based on an analysis of the context, and the needs of beneficiaries. We do this in consultation with partners, beneficiaries and other local actors.
4	All of our projects are based on a detailed analysis of the context. We clearly identify our target group and develop a detailed understanding of how and why they are marginalised. We do this jointly with partners, beneficiaries and other local actors.
5	All of our projects are based on a systematic analysis of the context. We use existing evidence of what works and what doesn’t in a given context, clearly identify our target group and develop a detailed understanding of how and why they are marginalised. Partners, beneficiaries and other local actors take the lead on this.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Planning

1	We have plans for our projects, but it is sometimes unclear how our activities are linked to objectives.
2	We have clear plans for our projects outlining objectives and related activities.
3	We have plans for our projects that identify the short and longer term outcomes that are needed to bring about our desired impact and the activities we will undertake to bring these changes about. We consult with partners and beneficiaries in our planning.
4	We have plans for all our projects that clearly identify the short and longer term outcomes that are needed to bring about our desired impact, the activities we will undertake to bring these changes about, how our project relates to the work of other actors and our assumptions. Our plans are often informed by learning from past experience and developed jointly with partners and beneficiaries.
5	We have realistic plans for all our projects that clearly identify the short and longer term outcomes that are needed to bring about our desired impact, the activities we will undertake to bring about these changes, how our project relate to the work of other actors and our assumptions. Our plans are always based on past learning and continually adapted based on new developments. Planning is led by partners and beneficiaries.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Indicators and Targets

1	We do not have ways of measuring key project outputs and outcomes.
2	We have indicators and targets for key project outputs, but many of our projects do not yet have indicators in place for measuring key outcomes.
3	Most of our projects have indicators for measuring outputs and outcomes, developed in consultation with partners and beneficiaries. We collect quantitative and/or qualitative baseline data and set targets based on this.
4	All our projects have quantitative and qualitative indicators for key outputs and outcomes, developed jointly with partners and beneficiaries. We always collect high quality quantitative and/or qualitative baseline data and set targets based on this.
5	All our projects have well thought through qualitative and quantitative indicators for key outputs and outcomes. Partners and beneficiaries lead on selecting indicators. We collect high quality quantitative and/or qualitative baseline data and set targets based on this. There are links between our project level indicators and organisation-wide measures of effectiveness.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Monitoring and Learning

1	We collect data on outputs for our projects. We rarely make the time to review the monitoring data or use it to inform decision-making.
2	We collect data on outputs for all our projects, and on outcomes for some of our projects. We try to make the time to review the monitoring data and use it to inform decision-making.
3	We collect data on outputs and outcomes for all of our projects. We make the time to review the monitoring data and use it to inform our internal decision-making.
4	We collect data on outputs and outcomes for all of our projects. We work jointly with partners and beneficiaries to collect data from a range of sources and perspectives and triangulate the results. We always make the time to review the monitoring data and use it to inform our internal decision-making.
5	We collect data on outputs and outcomes for all of our projects. With our support, partners and beneficiaries take the lead in collecting data from a range of sources and perspectives and triangulating the results. With partners, beneficiaries and other local actors we systematically review the monitoring data, use it to inform our decision-making and review our understanding of how change happens.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Evaluation and Learning

1	We only conduct evaluations of our projects when it is required by a donor. We rarely take action based on the findings.
2	We conduct evaluations of our projects when it is required by a donor. We try to find the time to review the findings and identify action points.
3	We conduct evaluations of our projects when it is required by donors, but view them as important opportunities for understanding and improving our projects. We always review evaluations and take action based on the findings.
4	We conduct evaluations of our projects whenever we can find the resources (not just when donors require them). When conducting evaluations we always define clear evaluation questions and ensure appropriate methods are used to answer them. We review evaluations, take action based on the findings, and refer to them when designing new projects. We often share the findings with others.
5	We evaluate projects whenever possible and actively seek resources to fund them (e.g. applying for research funds, partnerships with academics etc.). When conducting evaluations we always define a limited number of clear evaluation questions and ensure appropriate methods are used to answer them. We systematically review evaluations, take action based on findings and refer to them when designing new projects. Findings are always discussed with partners, beneficiaries and local actors and shared widely with others
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Programme resources

1	We often cannot implement our plans due to lack of resources.
2	We cannot always implement our plans because we have underestimated the resources needed. Most budgets correspond only roughly with project activities and work plans.
3	Our plans are generally realistic in terms of resources required and we are able to implement most of them. Some projects have detailed activity-based budgets.
4	We rarely fail to implement our plans because of a lack of funds. Most projects have activity-based budgets, with assumptions and explanations. Project staff review budgets and actual expenditure and adjust as necessary.
5	Our projects are fully-funded. Projects have activity-based budgets, and documented assumptions and explanations. Budgets and actual expenditure are reviewed every 3-4 months and budgets adjusted accordingly.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Resources for Monitoring

1	We often cannot effectively monitor and evaluate our projects because we do not budget sufficiently for monitoring and evaluation.
2	We always include monitoring and evaluation in our project budgets, but it is frequently not enough to conduct more than basic monitoring and evaluation.
3	We always include appropriate levels of resources in our project budgets to conduct a baseline, collect monitoring data and to conduct an evaluation.
4	We always include appropriate levels of resources in our project budgets to enable us to collect and store high quality monitoring data (including a baseline), conduct appropriate evaluations, and support learning and the dissemination of lessons learnt.
5	We always include appropriate levels of resources in our project budgets to enable us to collect and store high quality monitoring data (including a baseline) conduct appropriate evaluations, support learning and the dissemination of lessons learnt, and build staff capacity (e.g. staff training and/or recruiting new staff with monitoring and evaluation experience).
ANY COMMENTS OR SUPPORTING EVIDENCE	

8. Strategy for Impact

1	We do not yet have a strategy for ensuring the sustainability of our project impact.

2	We are starting to use some approaches to ensure the sustainability of our project impact.
3	We use tried and tested approaches to ensuring the sustainability of project impact in most of our projects and we are having some success.
4	We are committed to developing sustainability within all our projects. In addition to our tried and tested strategies for ensuring the sustainability of project impact, we are exploring some new strategies and sharing methods that have worked successfully in other contexts.
5	We have a range of different proven strategies for ensuring our project impact is sustainable. We are skilled at choosing and using these in varying contexts in all our projects.
ANY COMMENTS OR SUPPORTING EVIDENCE	

9. Sustainability of impact

1	Most of the benefits of our projects end after we leave.
2	Although some elements of our projects continue to give benefits after we leave, beneficiaries do not plan how to maintain them.
3	Beneficiaries sustain some elements of our projects after we leave, although they lack the necessary skills and resources to do this well. There are some longer term impacts.
4	Beneficiaries have taken ownership of some elements of our projects and have most of the skills and resources necessary to carry them on after we leave.
5	Beneficiaries have taken ownership of our projects and have the skills and resources to carry them on after we leave. There are demonstrable long term impacts.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 6: People

1. Skills and capacity

1	We have significant gaps in staff capacity. We are missing core skills and experience needed to implement our current activities.
2	We have a few gaps in staff capacity to implement our current activities, but are taking action to get the skills and experience we need.
3	All of our staff have the skills and experience needed to implement our current activities.
4	Our staff have a good mix of the skills, experience and expertise we need to implement our current activities and longer-term strategy.
5	Our staff have an excellent mix of the skills, experience and expertise we need to implement our current activities and longer-term strategy and to strengthen our

	organisation. We have staff that are leaders in their field.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Recruitment

1	We have a few standard recruitment and selection templates but do not yet have a consistent selection process.
2	We use standard recruitment and selection templates and are establishing a consistent selection process with a written policy.
3	We have a basic set of recruitment and selection policies and practices which are practiced consistently at headquarters.
4	Our fair and transparent recruitment policies and practices are consistently practiced at headquarters and are being adapted for field use. They take into account equal opportunities. The effectiveness of our policies is regularly monitored and reviewed.
5	Our fair and transparent recruitment policies and practices are consistently practiced across the organisation. Specific cultural norms and contexts are taken into account, and equal opportunities is practiced at all levels. The effectiveness and fairness of our procedures are regularly monitored and reviewed.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Policies

1	All new staff receive a contract including full terms and conditions when they start their post. If requested, staff are provided with information about specific employment policies and practices that may affect them.
2	All new staff receive a contract including full terms and conditions before they start. Staff are told about employment policies and practices that affect them.
3	Staff are familiar with employment policies and practices that affect them, and most managers are aware of their responsibilities to implement these policies.
4	Staff are familiar with the employment policies and practices that affect them and managers are fully aware of their responsibilities to implement these policies. Our policies and practices are regularly monitored and reviewed.
5	Staff are familiar with and understand all employment policies and practices that affect them and managers receive guidance on and are held to account for their effective implementation. Our policies and practices are regularly monitored and reviewed to reflect best practice.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Managing Performance

1	Most staff have written objectives, but their objectives are sometimes unclear or irrelevant to their role. Managers decide individually how best to supervise and assess the performance of staff.
2	Most staff have relevant objectives that reflect their job description and know who they report to. Managers follow our basic guidelines when supervising and assessing the performance of staff.
3	All staff have relevant objectives that reflect their job description. They know to whom they report on these and they receive periodic supervision. Most managers follow our guidelines on performance assessment. Managers receive information relevant to their people management responsibilities.
4	All staff have relevant, clear, attainable and time-bound objectives that reflect their job description. Most staff have regular supervision and formal appraisals to review performance and set new objectives. Most managers consider supporting staff performance to be an important part of their role and they follow our policies and procedures when assessing performance. Managers receive information and some support relevant to their people management responsibilities.
5	All staff have relevant, clear, attainable and time-bound objectives that reflect their job description. All staff have regular supervision and formal appraisals to review performance and set new objectives. All managers consider supporting and improving staff performance to be a critical part of their role, always follow our procedures when assessing performance and receive support in fulfilling their people management responsibilities.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Learning and Development

1	We give limited or no attention to staff development and training.
2	Managers talk to staff occasionally about their training needs but manager responses are inconsistent across the organisation. Some support to get relevant training is available to staff.
3	Our performance assessment guidelines include a section on training needs. These are usually followed by managers. Relevant training support is available to many of our staff and staff regularly make use of it.
4	Our performance assessment guidelines include a section on training and other development needs. These are consistently followed by all managers. We make relevant training available to all staff. Other staff development methods (e.g. mentoring, secondments) may be considered, as appropriate. Most staff regularly make use of training.
5	Managers effectively assess learning needs and facilitate individual development. Policies on staff training and development opportunities are consistently implemented and managers are held to account for this. We make relevant training available to all

	staff, and link to external qualifications where appropriate. Other staff development methods are actively considered as alternatives to/complementary to training. Staff regularly make use of training and we can demonstrate how it has improved our activities and organisational capacity.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Interns

1	We are often unclear with interns regarding what their rights and responsibilities are and we frequently give interns the work that staff members don't want to do.
2	We sometimes provide interns with a clear description of their rights, responsibilities and tasks when they start work and balance giving them administrative tasks and content related work.
3	We provide interns with a clear description of their rights, responsibilities and tasks when they start work and we try to provide them with opportunities to get new experience and skills. We provide supervision when we can.
4	We provide a clear description of an intern's rights, responsibilities and tasks in our job advertisements. We try to ensure interns get valuable experience and skills and that their work includes some challenging and stimulating tasks. We provide appropriate support and supervision and provide an exit interview with an appraisal of their performance.
5	We provide a clear description of an intern's rights, responsibilities and tasks in our job advertisements. We get consistent feedback from interns that they gained valuable skills and experience during their placements and were challenged and stimulated by their workload. We always provide appropriate support and supervision and conduct an exit interview with an appraisal of their performance.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Health, safety and security

1	We have a policy framework and procedural guidance notes but our working practice is informal and may not meet all the necessary legal requirements. We do not have a procedure for identifying health, safety and security risks and staff are rarely informed of these before departure.
2	We have a policy framework and procedural guidance notes and our working practice meets all basic legal requirements but the policy and procedure are not always consistently implemented. We identify major health, safety and security risks in the areas where we work. Staff are sometimes informed of these before departure.
3	We have a policy framework and procedural guidance notes and our working practice meets all basic legal requirements. We identify major health, safety and security risks in the areas where we work. We have basic security and evacuation plans. Staff are always informed of the risks and plans before departure.

4	We have a formal policy framework and procedural guidance notes and our working practice fully meets all legal requirements. We identify major health, safety and security risks in the areas where we work. We have basic security and evacuation plans. Staff are always informed of the risks and plans before departure. We consistently check that all relevant staff follow the necessary procedures.
5	We have a formal policy framework and procedural guidance notes and our working practice fully meets all legal requirements. We undertake full situational health, safety and security assessments of the areas where we work and we have detailed security and evacuation plans. All staff receive a verbal and written briefing on all relevant health, safety and security issues before departure and on an on-going basis when in post. All assessments and plans are updated on an appropriate and regular basis.
ANY COMMENTS OR SUPPORTING EVIDENCE	

8. Feedback

1	We make limited time to hear staff feedback.
2	Staff provide feedback on their satisfaction on an ad hoc basis but we do not document this and do not have a system for ensuring follow up.
3	We conduct assessments of staff satisfaction. Opportunities to discuss the results openly are limited.
4	We regularly conduct assessments of staff satisfaction, discuss the results openly and jointly agree action points with staff.
5	We regularly conduct assessments of staff satisfaction, discuss the results openly and jointly agree action points with staff. We can demonstrate a number of changes that have been made as a result of the assessment. We regularly review our assessment process.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 7: Money

1. Planning and fundraising

1	We do financial planning for individual projects but have no organisational financial strategy. We have an ad hoc approach to fundraising and our lack of reserves and narrow funding base make us financially vulnerable.
2	We have an organisational financial strategy that is based on the annual budget. We have some financial targets and we identify funding opportunities for the year ahead. We are trying to build our reserves by targeting unrestricted funds. Our funding base remains narrow.
3	We have an organisational financial strategy that has been developed to ensure longer-term financial stability. We have targets for raising funds and identify funding

	opportunities for the year ahead. We have plans for improving our reserves and overheads allocation. We are starting to diversify our funding base.
4	We have an organisational financial strategy that has been developed to ensure longer-term financial stability and that is closely linked to our fundraising strategy. We are meeting most of our fundraising targets and undertake an annual review of the funding environment to identify new opportunities; we have a satisfactory level of reserves, a wide range of income sources and adequate funding for activities.
5	We have an organisational financial strategy that has been developed to ensure longer-term financial stability and that is closely linked to our fundraising strategy. Our fundraising targets are being met or exceeded and we are regularly exploiting new funding opportunities. We have achieved our reserve targets and have diversified our funding base so that we have no major funding gaps or financial vulnerabilities. We are able to reject funds if they do not meet our requirements.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Financial risk management

1	We identify and manage financial risk but have no systems in place for recording these or ensuring action is being taken to address them.
2	We identify and assess financial risks and keep a record of this process in a risk register to help manage them, including key actions required to address the risk.
3	"We regularly identify and assess financial risks and keep a record of this process in a risk register to help manage them, including key actions required to address the risks. Our senior management and governing body use their regular meetings to monitor the progress of actions required on controlling and reducing our organisations most critical financial risks as highlighted by our financial performance indicators.
4	"Risk management practices such as using financial risk registers to systematically assess the probability and potential size of loss of income and regular follow-up of actions are embedded in our day to day management. Managers at all levels regularly review financial risks and whether actions are being implemented. Senior management and the governing body use their regular meetings to monitor the progress of actions required on the most critical financial risks and review the effectiveness of risk management mechanisms at least annually to ensure they are operating effectively. Our process is successfully helping us to control and reduce financial risks where necessary.
5	Our culture, led by the senior management and trustees, supports the identification of financial exposures and risks as part of our proactive approach to risk management. We use financial risk registers to systematically assess the probability and potential size of loss of income. Through developing our financial strategy, longer-term plans and reserves policy the assessment of financial risk and risk implications are widely understood and addressed. Our senior management and governing body regularly monitor the progress of actions required on the most critical financial risks and are in full agreement on key issues of financial risk. We have mechanisms, such as internal audit and other forms of review, to ensure that financial risk management processes are operating effectively.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Value for money

1	We try to use financial resources carefully, but do not have a strategy for managing and reducing the cost of inputs.
2	We have an understanding of the unit costs of inputs and use this to reduce expenses (e.g. through procurement). We have a procurement system that is helping us achieve cost reductions.
3	We have a solid understanding of unit costs of inputs within our organisation and use this to achieve significant savings (e.g. through procurement). For some of our programmes we are starting to monitor the cost of achieving particular outcomes.
4	We have evidence that we are making improvements in economy, (e.g. through procurement), and efficiency, (through improving the quality of outputs). For some of our programmes we can confidently explain and justify internally and externally the cost of achieving particular outcomes and can show how cost considerations informed choices in programme design and implementation.
5	We have a comprehensive approach to value for money at organisational and project level. Internal systems and data exist that enable us to analyse and compare economy, efficiency, and effectiveness against internal benchmarks when allocating resources. For all of our programmes we can confidently explain and justify internally and externally the cost of achieving particular outcomes and show how cost considerations informed choices in programme design and implementation.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Budgeting

1	We prepare budgets before the start of each project based on calculations from similar projects that we have delivered. We do not prepare a separate organisational budget.
2	We always prepare budgets in good time before the start of each project based on detailed costing of project activities. An annual organisational budget is prepared prior to the start of the year based on the consolidation of all project budgets and other non-project management costs.
3	We have a budgeting process where finance and programme staff work on developing project budgets together. The organisational budget is clearly linked to organisational priorities and project budgets link to activity plans; all budgets are regularly monitored and reviewed. Budgets are broken-down into distinct programmes and projects with a named individual responsible for the budget they manage.
4	Budgets are prepared by budget holders based on an assessment of needs and within the context of our organisational strategy. We have a 3 year rolling budget in order to ensure sustainability. The budget for the upcoming year is based on the detailed operational plan for that year whilst summary budgets for the following two years are based on the expected strategy for those periods. Budgets are broken down into distinct programmes and projects with a named individual and all budget holders are held accountable for their budget. The budget is monitored and adapted to reflect changing circumstances.

5	There is full involvement of all budget holders in the budget setting process. All budget holders have a detailed understanding of how their budget fits into the organisational budget and strategy. We have a 3 year rolling budget in order to ensure sustainability. The budget for the upcoming year is based on the detailed operational plan for that year whilst summary budgets for the following two years are based on the expected strategy for those periods. We have a strong culture of budget accountability across the organisation. The organisational budget and project budgets are regularly monitored and adapted to reflect changing circumstances and used as a key reference for resource allocation. Underlying risks and assumptions are clearly communicated to guide decision making.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Accounting systems

1	We keep books of accounts that record all payments and receipts and ensure every transaction has a supporting document, but we do not subject accounting entries to a review process and there are occasionally inaccuracies. We comply with all laws and regulations.
2	We have a unique list of accounting codes for the organisation and these are used to analyse each transaction item. We check the accuracy of the accounting books at the end of each month by comparing the accounting records to the closing bank statement and cash count balances.
3	Our accounting procedures are documented in a finance manual. We have a unique list of accounting codes and transactions that are classified by project or donor. We have a system in place to keep track of amounts owed to others (e.g. suppliers) and owed by others (e.g. staff) and accounts are prepared using this information. Financial data is subject to independent review.
4	Our accounting procedures are documented in a finance manual, clearly communicated across the organisation and consistently implemented. There is a timetable of monthly accounting routines. Managers understand and regularly compare the financial information against the budget to inform their decision making processes, and take corrective action as necessary. We always comply with the terms and conditions in grant agreements with donors.
5	Our accounting systems and procedures are appropriate to the size and nature of our organisation and existing systems compare favourably with our peer organisations that have a similar structure. There is a timetable of monthly accounting routines that exceeds the needs of all relevant staff. The processes and outputs of the accounting system are regularly reviewed and improved in line with best practice. Financial information is routinely used by managers in strategic and operational decision making.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Financial Reporting

1	We produce annual accounts showing money coming into the organisation and how it was spent. We meet the minimum legal reporting requirements.
2	We produce basic internal financial reports for each trustee meeting that compare the amount spent against the budget to highlight and explain variances. We prepare external financial reports for donors.
3	We produce internal quarterly financial reports for our trustees which are reviewed and discussed at each trustee meeting and budget holders receive monthly finance reports for their area of responsibility that compare actual spending to budget. Our financial reporting to donors is always in the appropriate format and on time. We sometimes ask for and incorporate feedback on the quality of our financial reports received from trustees and budget holders.
4	We produce financial reports on a regular basis that meet the needs of different internal and external stakeholders (trustees, senior management team, budget managers, donors) and effectively support operational and strategic decision making. Our reporting to donors is always in the appropriate format and on time and financial and narrative reports are always consistent and clearly linked to each other. We always ask for and incorporate feedback on the quality of our financial reports received from trustees and budget holders. We produce some financial information in an International Aid Transparency Initiative (IATI) compliant format.
5	We produce timely and robust financial reports on a regular basis that meet the needs of different internal and external stakeholders (trustees, senior management team, budget managers, donors) and effectively support operational and strategic decision making. We receive feedback that financial reports are widely understood across the organisation and used at all levels. Our reporting to donors is always of a very high quality. The content and use of finance reports are regularly reviewed and improved in line with organisational and statutory requirements. We produce the majority of financial information in an International Aid Transparency Initiative (IATI) compliant format.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Financial controls

1	We have basic financial control policies and procedures in place but these are not formally documented.
2	We have internal financial control policies and procedures in place which outline steps to safeguard assets, ensure accounting records are up-to-date and prevent fraud or errors.
3	We have internal financial control policies and procedures in place which outline clear practical steps to safeguard assets, ensure accounting records are comprehensive and up-to-date and prevent fraud or errors. We have clear levels of delegated responsibility for who can set up and authorise payments and who ensures compliance with the controls we have in place.
4	We have a robust system of internal financial controls to safeguard assets, ensure accounting records are comprehensive and up-to-date and prevent fraud or errors. We have clear levels of delegated responsibility for who can set up and authorise payments and who ensures compliance with the controls. The system is periodically reviewed through an internal audit self-assessment to ensure controls are being implemented effectively and adapted to reflect changes in the legal and regulatory environment (e.g. anti-bribery legislation). Our financial controls include whistleblowing policies for staff.

5	We have a robust system of financial controls appropriate to the scale and complexity of our organisation where responsibilities at all levels are clear and well understood. The system is regularly reviewed to ensure controls are being implemented effectively, where possible through an independent review process, and adapted to reflect changes in the legal and regulatory environment (e.g. anti-bribery legislation) and sector best practice. Our financial controls include whistleblowing policies for staff and mechanisms for beneficiaries and other external stakeholders to raise complaints confidentially.
ANY COMMENTS OR SUPPORTING EVIDENCE	

8. Staff Capacity

1	We have no staff dedicated exclusively to financial management. Staff can feel uncomfortable when faced with a financial management issue.
2	We have finance staff that have the skills and qualifications needed to carry out basic financial activities. Where necessary we seek external advice.
3	We have dedicated finance staff that are able to carry out a wide range of financial activities and work well with budget managers in budget monitoring and payment processing. Our budget managers and relevant programme staff have the necessary financial skills to manage budgets and implement controls.
4	We have a finance team that includes qualified accountants. Our finance staff work well with budget managers in budget monitoring and payment processing. They provide timely financial information for project managers, senior management and trustees. Most staff receive the training and support they need to carry out their financial management responsibilities.
5	We have a finance team that includes qualified accountants with prior experience of working in organisations that work internationally. Our finance staff provide timely financial information for budget managers, senior management and trustees and are skilled in helping staff interpret and understand financial information and use it in their operational decision making. All staff receive the training and support they need to carry out their financial management responsibilities.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 8: External relations

1. Communications strategy

1	We use a few methods to communicate our work. Communications are ad hoc and there is no formal planning.
2	We have identified some of our target audiences and are exploring different ways of communicating with them. We have started to develop a communications plan.
3	We have developed a communications plan which includes our target audiences, key

	messages and channels and have put together a communications schedule to ensure that our communications are timely and relevant.
4	We have a communications strategy that defines our target audiences and key messages and channels. This enables us to deliver clear messages to each target audience using a range of channels. We are coherent in how we communicate in our fundraising, public education, and advocacy work. Communications are delivered in line with our communications schedule.
5	We have a communications strategy that defines our target audiences and key messages and channels. This enables us to deliver clear tailored messages to each target audience using a range of channels aligned with audiences' preferences. We are coherent in how we communicate in our fundraising, public education, and advocacy work. We regularly monitor stakeholder responses to communications and make changes to our strategy based on this.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Creative communications

1	We have a website with limited information about our organisation and programmes.
2	We regularly update our website to ensure that it has a good level of information and detail about our organisation and programmes.
3	We regularly update our website and are trying out ways to use social media to communicate. Our communications are a two way process: our target audience engages with us as well as us engaging with them.
4	We are continually rethinking and looking for new ways to improve the way we use the web and digital media, including social media. Our communications are a multi-way process: our target audience engages with us and with others on our behalf.
5	We are using information technology creatively to improve communications with our target audience and build a two way flow of information. Our website and use of digital media, including social media, is transforming our relationships with target audiences who engage with us and with others on our behalf. We are recognised by our peers as being leaders in using new and creative technologies.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Media

1	We do not do media work and any coverage that has occurred has not been generated by us. We try to respond to media enquiries but don't always have the capacity to do so effectively.
2	We do not have a media plan but we do respond to media enquiries when we receive them. We recognise the importance of media engagement and are starting to build relationships with key media contacts.

3	We have a basic media plan which includes an outline of the procedure for responding to media enquiries and identifies internal spokespeople. We proactively identify key contacts and build relationships with them.
4	We have a media plan in place and take a proactive approach towards our media work, regularly sending press releases on topical issues that relate to our work to our media contacts. We receive coverage in a range of media reaching a diverse audience and we are analysing the effects. The media sometimes approaches us for information.
5	We have a media strategy and are generating repeated coverage in a wide range of media reaching a diverse audience. The media often approaches us as a respected source of information. We can demonstrate the impact of our media work on our ability to reach and influence our target audiences and create a strong profile for and understanding of our organisation. We monitor our media coverage so that we can demonstrate the impact of our media strategy and we adapt the strategy accordingly.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Supporters

1	We have not yet looked at how we can use our supporters to promote and support our work.
2	We are starting to develop an offer for our supporters on how they can engage with and support our work. Individuals sometimes undertake actions when we ask them to.
3	We offer a range of opportunities for our supporters to engage with and support our organisation. We have a small group of supporters that take action with guidance and help from us.
4	"We are effective at recruiting and retaining a committed supporter base. Our supporters are engaged in a range of activities to support our work, including fundraising, advocacy and public education and take action with some guidance from us. They have a good understanding of what we do and communicate this passionately to others.
5	We are highly effective at recruiting and retaining a diverse and committed supporter base. Our supporters are actively and creatively engaged in a wide range of activities to promote and support our work, including fundraising, advocacy and public education and take action with limited support from us. They have an excellent understanding of what we do and communicate this passionately and effectively to others. We monitor our supporters' satisfaction and make adjustments accordingly.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Institutional donors

1	We receive financial support from one or two donors. We deliver what is in our grant agreements without much discussion with the donor.
2	We receive financial support from a small number of donors and are building working relationships with a few donor staff. We occasionally raise relevant issues for discussion

	with our donors.
3	We receive financial support from a core group of donors and have good working relationships with some donor staff. Donors sometimes consult our organisation on relevant issues.
4	We receive financial support from a wide range of donors and have good working relationships with a wide range of donor staff. Our donors regularly consult our organisation on relevant issues, and sometimes we collaborate to identify shared interests and goals.
5	We receive consistent financial support from a wide range of donors. We have strong, well-managed donor relationships at an institutional level, and have strong relationships with a wide range of donor staff. We influence our donors thinking on many relevant issues, and collaborate on identifying shared interests and goals. We can demonstrate our influence on donor policy and practice.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Private Sector

1	We have not yet started to engage with the private sector or identify how partnerships could add value.
2	We receive financial support from the private sector and have identified some ways in which we could increase our engagement.
3	Private sector organisations provide us with donations and pro bono support, and share their skills and expertise.
4	Private sector organisations provide us with donations and pro bono support, and share their skills and expertise. We are developing some models of shared working that are consistent with our values and vision.
5	We have a private sector engagement strategy and are proactively seeking appropriate private sector partners. Private sector organisations provide us with donations and pro bono support, and share their skills and expertise. We have developed a number of joint objectives and innovative models of shared working that are consistent with our values and vision. Our collaboration brings significant added value to our work and we have systems in place to measure this.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Civil Society organisations

1	We have limited contact and rarely share information with other CSOs/NGOs working towards similar objectives.
2	We have informal contact with other CSOs/NGOs working towards similar objectives. We sometimes share information.
3	We have relationships with other CSOs/NGOs working towards similar objectives. We

	are seen as a helpful source of information by others. We participate in joint activities.
4	We have strong relationships with other CSOs/NGOs working towards similar objectives. We share expertise and information and work to coordinate our efforts. We participate in and sometimes lead on joint activities.
5	We have strong relationships with and are well respected by a wide range of CSOs/NGOs working towards similar objectives nationally and internationally. We share all significant expertise and information and are coordinating our efforts effectively. We participate in and frequently take a lead in joint activities. We are viewed by other CSOs/NGOs as a key player in collaborative working.
ANY COMMENTS OR SUPPORTING EVIDENCE	

8. Networks

	We are not involved in networks relevant to our objectives, but are looking at which networks might be relevant to our work.
	We have joined some networks relevant to our objectives, but do not participate actively.
	We are active members of national networks and alliances that share our objectives and sometimes work on joint projects with other organisations.
	We are active members of the relevant national and international networks and alliances that share our objectives. We regularly collaborate on joint projects with other organisations. We suggest new areas of work on which to collaborate.
	We play a lead role in establishing and facilitating strong national and international networks and alliances that share our objectives, sometimes hosting or providing secretariat support. We actively collaborate on joint projects and can show significant evidence of our contribution.
ANY COMMENTS OR SUPPORTING EVIDENCE	

9. Government

1	We have not yet started to identify or engage with government officials.
2	We have started to identify and engage with key government officials and have plans to strengthen our relationship with them.
3	We are building good informal relationships with key government officials. We are sometimes invited to engage with them on relevant issues.
4	We have strong formal relationships and access to key civil servants and elected representatives. We are regularly invited to engage with government officials on relevant issues. We have evidence that we are influencing attitudes and behaviour, resulting in some changes in policy and practice.
5	We have strong and influential relationships with key civil servants, elected representatives and ministers. Our relationships are at an institutional level and do not rely only on having a relationship with one representative from each government

	department. We are seen by officials in ministries and other government bodies as having an important role in our area of work. We have evidence that we have had substantial influence on government policy and practice.
ANY COMMENTS OR SUPPORTING EVIDENCE	

10. Research Community

1	We have not yet considered how engagement with the research community working in our area could be useful to our work.
2	We have a few informal links with the national research community working in our area. We sometimes share information.
3	We are recognised within the national research community working in our area. We participate in meetings and conferences.
4	We are respected within the national research community and are building relationships in the international research community working in our area. We participate in and sometimes organise joint meetings and conferences, and produce joint research.
5	We are well respected within the national and international research community working in our area. We take a leading role in organising and participating in regular meetings and conferences, share data and produce joint research.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 9: Monitoring

1. Culture

1	We give little priority to reflecting and learning from our experience or from evidence (e.g. evaluations, monitoring data, research) on what works and what doesn't in our area of work.
2	Reflecting and learning from our experience and from evidence (e.g. evaluations, monitoring data, research) on what works and what doesn't in our area of work is seen as important, but there is little time prioritised for these activities.
3	Reflecting and learning from our experience and from evidence (e.g. evaluations, monitoring data, research) on what works and what doesn't in our area of work is encouraged and time is prioritised for this. We always try to act on what we are learning.
4	Reflecting and learning from our experience and from evidence (e.g. evaluations, monitoring data, research) on what works and what doesn't in our area of work is actively encouraged and our workloads and plans take this into account. We systematically act on what we are learning.
5	Reflecting and learning from our experience and from evidence (e.g. evaluations, monitoring data, research) on what works and what doesn't in our area of work is a strategic priority and is incentivised. It is prioritised and modelled by senior management.

	We have evidence that our activities and organisational capacity have improved (in some cases significantly) as a result of our systematic approach to learning and reflection.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. System

1	Our monitoring and evaluation happens on a project by project basis in response to donor requirements. It is fragmented.
2	Our monitoring and evaluation happens on a project by project basis in response to donor requirements. We are starting to develop a more systematic way of measuring outputs and outcomes.
3	We have an emerging organisation-wide monitoring and evaluation system. We are measuring outputs and outcomes across most of our activities. We are able to aggregate basic output data (e.g. number of people reached).
4	We have an established organisation-wide monitoring and evaluation system which allows us to measure, use and share output, outcome and impact data from across most of our activities. It is used to support learning and decision making at different levels, and enables us to aggregate relevant output and outcome data from across our work.
5	Our monitoring and evaluation system is appropriate to the size and complexity of our organisation. It allows us to measure, use and share output, outcome and impact data from across all of our activities. It is widely used to support learning and decision-making at different levels, enables us to meet the information needs of different internal and external audiences, and allows us to aggregate relevant output and outcome data from across our work and demonstrate the overall impact of our work.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Communicating results

1	We do not communicate publicly on our outputs or outcomes. We make evaluations public only if it is a donor requirement.
2	We communicate publicly on our outputs and outcomes for a limited number of activities. We make evaluations public only if it is a donor requirement.
3	We communicate publicly on our outputs and outcomes for a range of activities which enables stakeholders to see how we are doing in relation to the objectives we set. We are proactive in making some evaluations public.
4	We communicate publicly on our outputs, outcomes and impacts in a consistent way which enables stakeholders (including beneficiaries) to see how we are doing in relation to the objectives we set. The information we publish is representative of the range of our activities. We always make our evaluations public and often include summaries and management responses.
5	We communicate publicly on our outputs, outcomes and impacts in a consistent and

	engaging way which enables stakeholders (including beneficiaries) to see how we are doing in relation to the objectives we set. The data we publish is representative of the range of our activities. Evaluations, summaries and management responses are always systematically made public. We include systematic feedback from beneficiaries and/or partners on our performance as part of our public communication.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Knowledge management

1	Knowledge and learning is not widely shared in or outside of our organisation, except informally.
2	Some of our staff are interested in sharing knowledge and learning internally. Sometimes knowledge is shared informally through personal contacts outside our organisation.
3	We share our knowledge and learning widely within the organisation, and with a range of external stakeholders.
4	We share our knowledge and learning widely within the organisation and externally by networking, making our documentation widely available and contributing to discussions on policy and practice with others working in our area.
5	We systematically share our knowledge and learning within the organisation and externally using a range of engaging and creative communication methods. We take a lead role in facilitating discussions with others working in our area and we have evidence of our knowledge and learning shaping the policy and practice of others.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Innovation

1	We rarely deviate from established work methods and there is little experimentation with new approaches.
2	Innovation does sometimes occur in our organisation but it is not actively supported or promoted.
3	We try to support and promote innovation and there is evidence of it happening. We can point to a few examples where the development and testing of a new idea led to an improvement in our activities and/or organisational capacity.
4	We actively encourage innovation and there is evidence of it happening frequently. The development and testing of new approaches has improved our activities and/or organisational capacity.
5	We have an organisational culture which supports and promotes innovation. Our senior management encourage us to challenge our assumptions and take intelligent risks and are comfortable with uncertainty. We have evidence that the development and testing of new approaches has improved (in some cases significantly) our activities and our organisational capacity. We are a source of new ideas for the sector and we have

	evidence that our approaches/ideas have been taken up by others.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Staff Capacity

1	We recognise the importance of monitoring and evaluation but many staff do not have the skills to carry it out.
2	We have identified the necessary skills and competencies needed to conduct good monitoring and evaluation and are looking at ways to build staff capacity.
3	Some staff have the basic skills and competencies needed to conduct monitoring and evaluation work and we are trying to build the capacity of others. Relevant staff have monitoring and evaluation as part of their personal objectives.
4	All relevant staff have the necessary skills and competencies needed to conduct good monitoring and evaluation, including designing monitoring and evaluation frameworks for programmes, collecting and analysing monitoring data and undertaking and/or commissioning evaluations. Monitoring and evaluation is included in the performance reviews of relevant staff.
5	All relevant staff are confident in designing monitoring and evaluation frameworks for their programmes, collecting and analysing monitoring data and undertaking and/or commissioning evaluations, and have monitoring and evaluation included in their performance reviews. They are strong and effective advocates of monitoring and evaluation among others internally and with partners.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Pillar 10: Internal relations

1. Communication

1	Important information is frequently not communicated internally and staff are often frustrated that they are not kept informed of relevant issues, developments and decisions.
2	We have some simple systems in place for our internal communication of key information. Staff sometimes feel that they are not sufficiently informed of relevant issues, developments and decisions.
3	We have identified actions to improve our internal communication and are setting up systems to enable regular sharing of information. Staff feel informed of relevant issues, developments and decisions most of the time.
4	We have set up internal communication systems to enable regular dialogue, sharing of information and learning across different groups in the organisation. These are being used regularly by staff. We have good informal communication. Staff feel well informed of relevant issues, developments and decisions.

5	We have a strong culture of open communication. Internal communication systems for dialogue, sharing of information and learning are functioning well across all levels and groups. Staff are proactive in communicating with each other. Our staff at all levels feel well informed of relevant issues, developments and decisions and that they are involved whenever relevant.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Collaboration

1	There is limited collaboration between groups (departments, teams) in our organisation.
2	There is some informal collaboration between groups (departments, teams) in our organisation. There are sometimes problems because of weak coordination.
3	Departments, teams and functions within our organisation collaborate regularly and share information and resources; there are few coordination difficulties. We do some joint planning and some joint work.
4	Departments, teams and functions within our organisation collaborate regularly and share information and resources. Joint planning and working has improved our impact and organisational capacity.
5	Departments, teams and functions within our organisation work in an integrated and coherent way; there is a free flow of ideas, experiences and lessons learnt between them. Regular joint planning and working has improved (in some cases significantly) our impact and our organisational capacity.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Staff Participation

1	We rely on our organisation's leadership for making decisions.
2	Decisions are taken by our leaders. We state that we believe in the participation of staff/volunteers, but do not create many opportunities for this.
3	Our leaders actively encourage staff participation in decision-making, but apart from staff representatives, only a few people are clear on how to engage.
4	Consultation is consistently encouraged and it is clear to most of our staff how, and when, they can engage, with some take-up on these opportunities.
5	Consultation is integral to our culture and staff are all clear on how, and when, they can engage in diverse decision making structures and processes, individually and collectively. There is active take-up and staff can describe how they have influenced decisions at all levels.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Country offices

1	Our communications with country offices are sometimes unclear and irregular. Our different roles and responsibilities are not always clear.
2	We occasionally have problems as a result of weak communication with country offices and are trying to make our communications clearer and more regular. We are clarifying our different roles and responsibilities.
3	Our communications with our country offices are clear and regular. We are starting to think about how we can ensure that country offices are not overloaded with requests for information from staff. Our different roles and responsibilities are clear. Most decisions are taken at appropriate levels.
4	We communicate relevant information to our country offices clearly and regularly. We have a system for coordinating requests for information from country offices to ensure offices are not overloaded. Our different roles and responsibilities are clear and understood by both parties. Decisions are always taken at appropriate levels.
5	We communicate relevant information to our country offices clearly and regularly. We always coordinate requests for information from country offices to ensure offices are not overloaded. Our different roles and responsibilities are clear and understood by both parties. Decisions are always taken at appropriate levels and country offices are autonomous where appropriate.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Affiliates/ Members

1	We do not yet have a strategy for our collaboration or communication with our affiliates/members, but we occasionally collaborate on specific activities.
2	We are clear about how communication and collaboration with our affiliates/members can help us to achieve our organisational objectives. We are identifying more ways in which we can collaborate in joint activities.
3	We have identified ways in which we can communicate and collaborate with our affiliates/members, and these are clearly linked to our organisational objectives. We regularly collaborate in a range of activities.
4	Collaboration with our affiliates/members is part of our organisational strategy. We systematically collaborate on activities and programmes and build on each others strengths, skills and expertise in a way that adds value to our ourselves, other affiliates and the family/network as a whole.
5	Collaboration with our affiliates/members is a crucial part of our organisational strategy. We work together on a wide range of activities and programmes, and build on each others' strengths, skills and expertise in a way that is innovative and adds value to ourselves, affiliates/members and the family/network as a whole. We continually monitor and review the way we collaborate and make adjustments.
ANY COMMENTS OR SUPPORTING EVIDENCE	

Section 11: Influencing

1. Strategy

1	We make decisions about our advocacy on an initiative by initiative basis.
2	We make decisions about our advocacy on an initiative by initiative basis, but we are starting to develop an organisation-wide approach to advocacy.
3	We have an organisation-wide approach to advocacy and advocacy is included in our organisational strategy.
4	We have an organisation-wide approach to advocacy. Advocacy is one of our core strategies for change, and we have an integrated approach to advocacy that brings together different parts of the organisation.
5	We have an organisation-wide approach to advocacy. Advocacy is one of our core strategies for change, and we have an integrated approach that brings together different parts of the organisation. Senior management are strongly committed to and provide leadership on our advocacy work.
ANY COMMENTS OR SUPPORTING EVIDENCE	

2. Evidence base

1	We use easily available secondary sources to inform our advocacy position.
2	We use easily available secondary sources and evidence produced by the networks we are part of to inform our advocacy position.
3	We use secondary sources (including evidence produced by the networks we are part of) and collect a limited amount of primary data to inform our advocacy position.
4	We use a range of primary and secondary sources to inform our advocacy position. Where possible we draw on the perspectives of our partners and beneficiaries.
5	We undertake high quality research (primary and secondary) and analysis to inform our advocacy position. We always ground our research in the perspectives of our partners and beneficiaries. Our research is frequently used as a resource by others.
ANY COMMENTS OR SUPPORTING EVIDENCE	

3. Context analysis

1	Our understanding of the political context for our advocacy work is limited.
2	We have a basic understanding of the political context of our advocacy work and have identified our key audiences and targets.

3	We have a good understanding of the political context of our advocacy work. We have identified key audiences and targets and have mapped the roles of other actors working in the area.
4	We have an excellent understanding of the political context of our advocacy work. We have good knowledge of our key audiences and targets, and have mapped the roles and interests of other actors working in the area.
5	We have an excellent understanding of the political context of our advocacy work; we have detailed knowledge of our key audiences and targets, understand their positions, and have mapped the roles and interests of other actors working in the area. We have ways of keeping up to date with political developments and exploring future scenarios.
ANY COMMENTS OR SUPPORTING EVIDENCE	

4. Planning

1	We have plans for our advocacy work, but it is sometimes unclear how our activities are linked to objectives.
2	We have plans for our advocacy work that clearly outline objectives and related activities.
3	We have plans for our advocacy work that identify the short and longer term outcomes that are needed to bring about our desired impact, the activities we will undertake to bring about these changes and indicators for tracking progress. We try to consult with partners and allies in our planning.
4	We have plans for our advocacy work that clearly identify the short and longer term outcomes that are needed to bring about our desired impact, the activities we will undertake to bring about these changes, how our work relates to the activities of other actors, our assumptions, and indicators for tracking progress. We always consult with partners and allies in our planning.
5	We have plans for our advocacy work that clearly identify the short and longer term outcomes that are needed to bring about our desired impact, the activities we will undertake to bring about these changes, how our work relates to the activities of other actors, our assumptions, and indicators for tracking progress. Our planning is done jointly with partners and allies, is based on past experience and learning, and is continually adapted based on new developments.
ANY COMMENTS OR SUPPORTING EVIDENCE	

5. Monitoring and Learning

1	We monitor outputs for some of our advocacy work. We rarely make the time to review the monitoring data and use it to inform decision making.
2	We monitor outputs for most of our advocacy work. We try to make the time to review the monitoring data and use it to inform decision making.
3	We monitor outputs for all of our advocacy work, and outcomes for most of our advocacy

	work. We make the time to review the monitoring data and use it to inform decision making.
4	We monitor outputs and outcomes for all of our advocacy work. We collect data from a range of sources and perspectives and triangulate the results. We always make the time to review the monitoring data and use it to inform decision making.
5	We monitor outputs and outcomes for all of our advocacy work. We collect data from a range of sources and perspectives and triangulate the results. We systematically discuss the monitoring data with key partners and allies, use it to inform our and their decision-making and to review and revise our understanding of how change happens.
ANY COMMENTS OR SUPPORTING EVIDENCE	

6. Evaluation and Learning

1	We only conduct evaluations of our advocacy when it is required by a donor. The findings from evaluations rarely influence future advocacy planning.
2	We only conduct evaluations of our advocacy when required by a donor. We try to find the time to reflect on the findings. We sometimes take action based on the findings.
3	We conduct evaluations of our advocacy when it is required by donors, but view them as important opportunities for understanding and improving our work. We always review evaluations and take action based on the findings.
4	We evaluate our advocacy work whenever we can find the resources (not just when donors require them). When conducting advocacy evaluations we always define clear evaluation questions and ensure appropriate methods are used to answer them. We systematically review evaluations, take action based on the findings, and refer to them when designing new advocacy work.
5	We evaluate our advocacy work whenever possible and actively seek resources to fund them (e.g. applying for research funds, partnerships with academics etc.). When conducting advocacy evaluations we always define a limited number of clear evaluation questions and ensure appropriate methods are used to answer them. We systematically review evaluations, take action based on findings and refer to them when designing new advocacy work. Findings are always discussed with partners and allies and shared widely with others.
ANY COMMENTS OR SUPPORTING EVIDENCE	

7. Staff Capacity

1	We have not yet identified the necessary skills needed for good advocacy work.
2	We have identified the necessary skills and knowledge needed for good advocacy work in our area, and are looking at ways to build staff capacity.
3	Some staff have the basic skills and knowledge needed for good advocacy work in our area, and we are trying to build the capacity of others.

4	All relevant staff have the skills and knowledge needed for good advocacy work in our area, including policy formulation, collaboration, communication, mobilisation, influencing, and monitoring and evaluation. Staff have a good understanding of the specific policies and targets that concern our advocacy.
5	All relevant staff have strong skills and knowledge in advocacy work including policy formulation, collaboration, communication, mobilisation, influencing, and monitoring and evaluation. Staff can adapt these skills to multiple contexts. Some of our staff are recognised as experts in the specific policies and targets that concern our advocacy.
ANY COMMENTS OR SUPPORTING EVIDENCE	

8. Collaboration

1	We rarely share information with other actors working towards similar advocacy objectives.
2	We have informal contact with other actors working towards similar advocacy objectives. We sometimes share information.
3	We have relationships with other actors working towards similar advocacy objectives. We are seen as a helpful source of information by others. We participate in joint activities.
4	We have strong relationships with other actors working towards similar advocacy objectives. We share expertise and information and work to coordinate our efforts. We participate in and sometimes lead on joint activities.
5	We have strong relationships with and are well respected by a wide range of actors working towards similar advocacy objectives. We share all expertise and information and are coordinating our efforts effectively. We participate in and frequently take a lead in joint activities. We are viewed by others as a key player in collaborative advocacy.
ANY COMMENTS OR SUPPORTING EVIDENCE	

9. Public Mobilisation

1	We let our supporters know of actions being organised by others.
2	We are identifying ways in which we can mobilise public support for our advocacy objectives.
3	We have had some success in mobilising the public in support of our advocacy objectives. We have a small group of supporters that take action in support of our advocacy objectives with guidance and close support from us.
4	We are able to mobilise the public in support of our advocacy objectives. We have a supporter base that takes actions in support of our advocacy objectives with limited support from us, and includes people that can speak confidently about our issue to decision-makers.
5	We are able to mobilise the public in support of our advocacy objectives at scale and in collaboration with others. We have a diverse supporter base that takes actions in support of our advocacy objectives with limited support from us, and includes people that

	can speak confidently about our issue to decision-makers. Decision-makers report that our public mobilisation has had an influence.
ANY COMMENTS OR SUPPORTING EVIDENCE	

10. Beneficiary Involvement

1	We inform beneficiaries and partners about our advocacy work, but do not yet engage them in design or implementation. We base our advocacy on our perception of beneficiaries' needs.
2	We sometimes informally consult beneficiaries and partners when we are designing and implementing our advocacy work. There are clear links between the needs of our beneficiaries and our advocacy work.
3	We formally consult beneficiaries and partners on the design and implementation of our advocacy work, and they sometime take part in the implementation of our advocacy activities. We work jointly with beneficiaries to identify our advocacy priorities.
4	Beneficiaries and partners play an active role in designing, implementing and monitoring our advocacy work. Our advocacy work is driven by the priorities of our beneficiaries.
5	Beneficiaries and partners take the lead in designing, implementing, and monitoring our joint advocacy work, and we are supporting them to do this. Our advocacy work is driven by the priorities of our beneficiaries, and particular attention is paid to the voices of the most marginalised.
ANY COMMENTS OR SUPPORTING EVIDENCE	

11. Policy Influence

1	Our advocacy work is emerging. We have not yet started to identify, engage with or influence decision-makers.
2	We are starting to identify and engage with decision makers, although we have not yet seen changes in their attitudes and behaviour as a result of our advocacy work.
3	We are starting to see changes in the attitudes and behaviours of decision makers as a result of our advocacy work. We are sometimes invited to engage with decision makers on our advocacy issue.
4	We have evidence that our advocacy work is influencing the attitudes and behaviours of decision makers, resulting in some changes in policy and practice. We are building strong relationships with some decision makers and are regularly invited to engage with them.
5	We have evidence that our advocacy work has had substantial influence on the attitudes and behaviours of decision makers, which has resulted in changes in policy and practice. We have strong relationships with key decision makers and are regularly invited to engage with them and help shape policy agendas.
ANY COMMENTS OR SUPPORTING EVIDENCE	