

<p><b>Procedure Logic</b></p>	<p><b>Partner Assessment</b></p> <p>This procedure is linked to the approval of projects. Before deciding to support a specific project, DCA must assess the implementing partner organisation overall as well as its specific capacities in relation to the particular project in order to maximise chances of a smooth implementation and to identify possible needs for capacity building support. This tool is hoped to be useful in that connection.</p> <p>A secondary purpose is to gradually build up an overview of the partner portfolio in each country, based on a brief assessment of:</p> <ul style="list-style-type: none"> <li>o The comparative advantages that make the organisation a relevant partner to DCA</li> <li>o How the partner organisation meets the technical capacities (methodologies) required for the given programme type</li> <li>o Organisational concerns that have to be taken into account</li> </ul> <p>For new partners, in some cases there may be a need for a more thorough external organisational assessment, depending on the size and scope of the project. Inputs for drafting of ToR for such exercises can be provided by PDU. However, in most cases this brief assessment should be sufficient.</p>
<p><b>The Process</b></p>	<p>The Partner Assessment format consists of three sections:</p> <p>1. The Front Sheet (section 1) carries identification information as well as space for writing the partner profile summary, which should be based on information from sections 2 and 3 but could also include other sources, e.g. references from sister agencies.</p> <p>2. Brief Organisational Assessment and 3. Project Specific Data are intended to be used by a DCA programme officer by going through each question with relevant key persons from the partner organisation and noting down brief responses.</p> <p>It may be a good idea to revisit (but not necessarily changed) sections 1 and 2 every time a new project is being prepared with the partner.</p> <p>If during the assessment the DCA programme officer comes across areas that arouse concern, it is advisable to include the DCA Representative in a discussion on how this should be coped with. A solution may be to take a deeper look into some of the problematic points.</p>

## 1. FRONT SHEET

Date of the assessment:	
Name of the persons undertaking the assessment, from the organisation and DCA:	
Partner organisation name (PHS Stakeholder ID, if any)	
Is the partner new to DCA?	
Type of organisation (use several check marks if relevant)	<input type="checkbox"/> Relief <input type="checkbox"/> Development <input type="checkbox"/> Advocacy <input type="checkbox"/> Church <input type="checkbox"/> NGO <input type="checkbox"/> Network <input type="checkbox"/> ACT Member

**PARTNER PROFILE SUMMARY #**

Describe: <ul style="list-style-type: none"> <li>o Comparative advantages that make the organisation a relevant partner to DCA.</li> <li>o How the partner organisation meets the technical capacities (methodologies) required for the given programme type?</li> <li>o Organisational concerns that would need follow up in order to ensure an efficient project implementation</li> <li>o Describe possible capacity building plans agreed for the partner organisation</li> </ul>	
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## 2. BRIEF ORGANISATIONAL ASSESSMENT OF THE PARTNER

### ORGANISATIONAL PURPOSE/ GOAL

Describe in brief:

- o Key elements of the purpose and goal(s) of the organisation?
- o
- o How do purpose/ goal(s) match DCA's values?
- o
- o Constituency (members and groups associated with the organisation)
- o
- o Policy documents?/ Emergency response plans, gender policy, HIV/Aids policy, etc.
- o

### SIZE AND SCOPE

Indicate with check marks the geographical scope of the organisation:

- International
- National
- Local (province, district)
- Community based

Describe in brief:

- o For how long time has the organisation been operational in the context?
- o
- o Main activity fields?
- o
- o Geographical areas of operation?
- o

### GOVERNANCE

Legal framework

- o Name and position of person(s) in charge of the organisation?
- o
- o Does the organisation have written statutes? (If so, request a copy)
- o
- o Procedure for election of board?
- o
- o Roles of the governing body, management and staff – very brief indications.
- o
- o How does the organisation interact with its constituencies?
- o
- o Has the organisation adopted Code of Conduct in Disaster Relief and/or similar?
- o

### MANAGEMENT, ADMINISTRATIVE and FINANCE PROCEDURES<sup>1</sup>

- o Does the organisation adhere to a specific set of administration procedures? (for staff and management, e.g, salary and allowances, exchange of information, handling of procurement, etc.).
- o
- o How is the balance of male and female members at management and staff level. (brief indication)
- o
- o How frequently does management review budgets compared to actuals for the organisation? – and for projects?
- o
- o Does the organisation prepare consolidated management accounts? How often?
- o

<sup>1</sup> For this section, it may be useful to study an organigram together with the partner

- Does the organisation prepare annual statutory accounts, signed by the directors/management?
- 
- Is there regular external audit?<sup>2</sup>
- 
- Have audits given ground for further examination of the financial records or the procedures used?
- 

### PLANNING

How it takes place, and by whom?

- Is the organisation familiar with using the logical framework planning (LFA) and participatory approaches?
- 
- Who is typical involved in the planning processes?
- 
- Is the organisation familiar with writing up project documents, and confident to undertake the analysis and processes involved?
- 
- Does the organisation have adequate budgeting skills?
- 
- Does the organisation have adequate procurement skills?
- 

### 3. PROJECT SPECIFIC DATA

(This part is relevant for every new project)

#### PROJECT IMPLEMENTATION

Management and staff

Outline management and decision making structure for the project and explain through the below questions how the implementing staff is supposed to operate (it may prove helpful if the partner organisation makes a brief organisational chart).

- Are staff skills and numbers sufficient for the planned project?
- 
- How is the balance of male and female staff?
- 
- What are the mandates for the staff involved in the planned project? (E.g. which key decisions can the implementing staff take and *not* take?)
- 
- Who is involved in project supervision and monitoring and how often does this take place?
- 
- How is feed back from the implementing staff managed in the organisation?
- 

#### MONITORING and REPORTING

Standards, quality assurance and documentation

With regard to external donor requirements, does the organisation have experiences and confidence in monitoring and reporting on: (use check mark)

- Danida funded activities
- EU funded activities
- Other (specify)

State previous year's donor funded turnover.

<sup>2</sup> Request copy of the most recent audit

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**PROJECT RELATED CAPACITIES**

- o Describe main areas of competence of the organisation in general
- o
- o List technical capacities available in the organisation that are relevant for the specific project
- o
- o List project management capacities available in the organisation, taking into account both organisational and administrative capacities needed for planning, design and implementation of the project.
- o

**NETWORKING AND COOPERATION**

- o Mention networks and other kinds of institutional cooperation the partner organisation is involved in:
- o

Name of the project proposal for which this assessment is carried out:	
Date:	