



Stages of Accompaniment Checklist

Name of Partner Organization _____

Name of CRS Lead _____

✓	(1a) GETTING STARTED	✓	(1b) INITIAL FOLLOW-UP
	Set a time and date for discussing the accompaniment process		Stay up-to-date on your timeline and commitments
	Remind yourself and other staff involved in the accompaniment process of the attitudes that support partnership		Follow-up face-to-face, when possible
	Set the stage for joint ownership by co-creating an accompaniment plan		Check in on the key actions in the accompaniment plan
	Agree upon concrete, scheduled next steps		Keep commitments outlined in accompaniment plan
	Document the experience thus far		Document the experience thus far

✓	(2a) COACHING	✓	(2b) COACHING FOLLOW-UP
	Review first draft of any products of the capacity strengthening (CS) intervention*		Review final draft of any products of the CS intervention
	Introduce or review any related reading or studies that can strengthen the CS intervention		Ask your partner for any final questions and provide final recommendations
	Make recommendations		Help your partner plan for testing
	Ensure your coaching is done in the spirit of the partnership principles and the attitudes that support partnership		Ensure that best practices are being followed for continued communication
	Document the experience thus far		Document the experience thus far

*CS Intervention includes policies, procedures, systems, processes, etc. and any capacity building that results in the application of new knowledge, skills and/or attitudes

✓	(3a) TESTING	✓	(3b) TESTING FOLLOW-UP
	Establish times to check-in about agreed upon CS intervention and see if you can answer any questions		Confirm that agreed upon changes were incorporated into the final version of the CS intervention
	Remind your partner to elicit feedback on the CS intervention from their staff		Inform any key stakeholders of progress and also share any final documentation and advice
	Discuss changes based on what was learned during the testing phase		Ensure that new/improved CS interventions set in place are fully integrated, owned and feasible for the partner organization
	Document the experience thus far		Document the experience thus far

✓	(4) FINALIZATION
	Confirm that all relevant staff have received hard copies of/access to any new policies, systems, etc.
	Keep a copy any products of the CS intervention or evidences of the newly applied knowledge, skills or attitudes for yourself.
	Document the experience- successes, challenges, lessons learned and any remaining questions or concerns.
	Confirm that the board of the partner organization was informed of, and/or signed off on any of the products of the intervention
	Congratulate your partner for a job well done!