Capacity Building
Self-Assessment Guide for Microinsurance Providers

<table>
<tr><td colspan="3">1. Applicant information</td></tr>
<tr><td>Organization (For a consortium, please indicate the lead and all other partner organizations)</td><td colspan="2"></td></tr>
<tr><td>Contact person’s name and title</td><td colspan="2"></td></tr>
<tr><td>Mailing address (including city and country)</td><td colspan="2"></td></tr>
<tr><td>Email address</td><td colspan="2"></td></tr>
<tr><td>Telephone number (including country code)</td><td colspan="2"></td></tr>
<tr><td>Type of organization
(check all that applies)</td><td>☐ Primary cooperative society
☐ Cooperative union
☐ Cooperative federation
☐ Cooperative college
☐ Cooperative insurance
☐ Cooperative bank
☐ Public institution
☐ Other member-based organization</td><td>☐ NGO (specify):
☐ For-profit banking institution
☐ For-profit insurance broker
☐ For-profit insurance company
☐ For-profit technology company
☐ For-profit third party administrator
☐ Other (specify):</td></tr>
<tr><td colspan="3">1. Institutional and regulatory framework</td></tr>
<tr><td>What are the main characteristics of the insurance market in your country? How are your target customers currently being served for their insurance needs?</td><td colspan="2"></td></tr>
<tr><td>Explain the main characteristics of the legal framework for insurance. Which roles can your organization legally play in the insurance sector?</td><td colspan="2"></td></tr>
<tr><td colspan="3">2. Target market’s needs and risk management strategies</td></tr>
<tr><td>Describe the target customers to whom you intend to provide microinsurance, the major risks they face and the typical financial consequences when faced with a peril. How do they prioritize their risk management needs?</td><td colspan="2"></td></tr>
<tr><td>Which risk-management tools – e.g. savings, loans, insurance – are currently available to your target customers?</td><td colspan="2"></td></tr>
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To what extend are your target customers familiar with insurance? How many already purchase insurance? Which products and from whom?	
3. Microinsurance activities	
Describe your organization's microinsurance activities in terms of (i) product (ii) institutional models addressing delivery channels, administration, risk management (iii) consumer education Discuss the benefits to your target customers and your approach to implementation.	
To what extend (i) are existing products not accessible by your target customers? (ii) would your approach improve the coverage/quality of insurances for your target customers?	
What external assistance is needed?	
Please share the contact details of any local microinsurance consultants you recommend.	
4. Insurance products and institutional capacity	
Describe your organization's capability gaps related to the provision of risk-management products? Address information management, accounting and financial reporting.	
What financial resources do you have to undertake your microinsurance activities?	