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Volume I: PCM Training Manual Narrative

Module 5:

Project Monitoring & Evaluation (PME) in Project Cycle Management

Final Version

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Abbreviation

| | |
|----------|---|
| CBOs | Community Based Organizations |
| CREAM | Clear, Relevant, Economic, Adequate and Monitorable |
| CEO | Chief Executive Officer |
| DAC | Development Assessment Criteria |
| ED | Executive Director |
| IFRC | International Federation of Red Cross and Crescent |
| ITT | Indicator Tracking Table |
| Logframe | Logical Framework |
| LFA | Logical Framework Analysis |
| MoU | Memorandum of Understanding |
| NGOs | Non-Governmental Organizations |
| OECD | Organization for Economic Cooperation and Development |
| OVI | Objectively Verifiable Indicators |
| PMER | Program or project monitoring and evaluation report |
| KPI | Key Performance Indicator |
| SMART | Specific, Measurable, Achievable, Realistic and Timeframe |
| TORs | Terms of References |

1. General Introduction

Objective: After this session, participants/trainees will understand about training objectives of the module, contents to be covered, and completed pre-test of the M&E module.

Material needed: Flipcharts, color papers, markers, handouts and LCD for PowerPoint presentation

Time needed: About 60 minutes (include pre-test time)

Steps:

Step1: After registration of participants/trainees, introduction, sharing expectations about M&E in any project or program and conduct pre-test.

1.1. Self-Introduction

The Trainer warms up the class by greeting participants by saying “Good morning everyone” and asks general questions about their well-being or travelling etc. Then the Trainer introduce the session by inviting everyone to introduce him/herself¹.

1.2. Objectives of the M&E training module

This Project Monitoring & Evaluation is the last module of the Project Cycle Management which is intended to assist participants, especially NGOs and CSOs Leaders/Managers to understand the processes, methods, approaches and tools for effective monitoring and evaluation of a project or program being implemented by their organizations/institutions.

By the end of this training course on M&E module, the participants/ trainees will:

- Understand key elements of project monitoring and evaluation and its cycle within the project or program
- Understand key functions of M&E in project or program, system and framework as well as evaluation criteria
- Understand and adopt some methods and tools for effective project Monitoring& Evaluation
- Understand about database management system (DMS) that could help project staff to install and use that database for tracking their performance
- Understand and adopt some reporting template to use in their organization.

1.3. Contents of the M&E module

There are 8 main sessions included in this module:

1) General Introduction

- Self-introduction
- Objectives of the modules

¹ There are many ways to self-introduction or warm up during this first stage of the session including pairing participants to interview each other about name, family status and expectations right away.

- Contents of the module
- Pre-test of the module

2) Overview of M&E module

- What is project PME?
- Why is PI important in PME?
- How to ensure obtaining effective PME?
- Recommended tools and/or techniques to be used in PME

3) M&E in Project Cycle Management (PCM)

- Definitions
- Why M&E important in PCM?
- The differences between Monitoring & Evaluation

4) M&E System and Framework,

- Elements of a good M&E system
- Tasks in Monitoring and Evaluation (tasks for monitoring and tasks for evaluation)
- Steps in Monitoring and Evaluation (steps for monitoring and steps for evaluation)
- Key Criterion for Monitoring and Evaluation
- Planning and steps for Project Monitoring and Evaluation

5) M&E and Database Management System (DMS),

- What is DMS?
- Why DMS is important in Project Cycle Management
- How to do it? and suggested tools

6) M&E Approach

- Utilizing Logical Framework Approach
- Understanding about Indicators
- M& Planning and Implementing or launching

7) M&E Report and

- What is M&E report?
- Why is it important to have M&E report?
- Process of reporting and dissemination
- Characteristic of good M&E reporting

8) Post-Test and Evaluation

- Post test and wrap up the session

1.4. Pre-Test of the M&E module

The Trainer informs the participants about M&E Pre/Post Test and distributing the Pre-test form to all participants by setting time about 15-20 minutes. Trainer should inform participants that this pre-test is not intended to put the scores and subject to certificate qualification but just want to measure the knowledge of the participants before and after the training only.

2. Overview of Project Monitoring & Evaluation (PME)

Step 2: As the session begins, give an overall picture of Project Cycle Management, especially in relation to M&E part (see the slide presentation, Session 1 on Overview of M&E). After that trainer will ask participants to brainstorming on what is Project M&E (PME) in general and trainer needs to write down on flip chart.

2.1. What is Project Monitoring & Evaluation?

2.1.1. Definition of “PME”

Each development organization typically has its own definition for monitoring, evaluation and other development terms and concepts.

It is a process that helps improve performance and achieve results of the project. Its goal is to improve current and future management of outputs, outcomes and impact.



“Monitoring” definitions:

- A management activity that allows a continuous adaptation of the intervention if problems arise or if changes in the context have an influence on the performance of the operation¹.
- The systematic collection of information on all aspects of the project while it is being implemented¹.
- A continuing function that aims primarily to provide the management and main stakeholders of an ongoing intervention with early indications of progress, or lack thereof, in the achievement of results¹.

After giving definition on Monitoring, then the trainer give definition on Evaluation, as following:

“Evaluation” definitions:

- A systematic and objective assessment of ongoing or completed project. It makes comparison of the outcomes of the project with planned ones.
- An assessment, as systematic and objective as possible, of an ongoing or completed project, program or policy, its design, implementation and results. The aim is to determine the relevance and fulfillment of objectives, developmental efficiency, effectiveness, impact and sustainability. An evaluation should provide information that is credible and useful, enabling the incorporation of lessons learned into the decision-making process of both recipients and donors.
- The process of determining the worth or significance of a project to determine the relevance of objectives, the efficacy of design and implementation, the efficiency or resource use, and the sustainability of results. An evaluation should (enable) the incorporation of lessons learned into the decision-making process of both partner and donor.

2.2. Why is it important in PCM?

Then, the Trainer will ask participants why it is important? and Trainer needs to write answers from participants down on the flip chart.

Monitoring and evaluation are critical for building a strong, global evidence base around violence against women and for assessing the wide, diverse range of interventions being implemented to address it. At the global level, it is a tool for identifying and documenting successful programs and approaches and tracking progress toward common indicators across related projects.

It is important to remember that:

- ✓ Evaluation requires study design.
- ✓ Evaluation sometimes requires a control or comparison group.
- ✓ Evaluation involves measurements over time.
- ✓ Evaluation involves special studies

2.3. How to ensure obtaining effective PME?

To be an effective for project monitoring and evaluation, the organization needs to ensure that it have adequate resources (human and financial resources) allocated to this particular task. All relevant data or information (baseline and endline data) is needed to be in place to guide and support decision during the project implementation and even dealing with designing any policy for the organization.

2.4. Recommended tools and/or techniques to be used in PME

Step 3: After explaining participants about how to ensure obtaining effective PME, then the Trainer will need to show the recommended tools or techniques to be used in PME. These tools are:

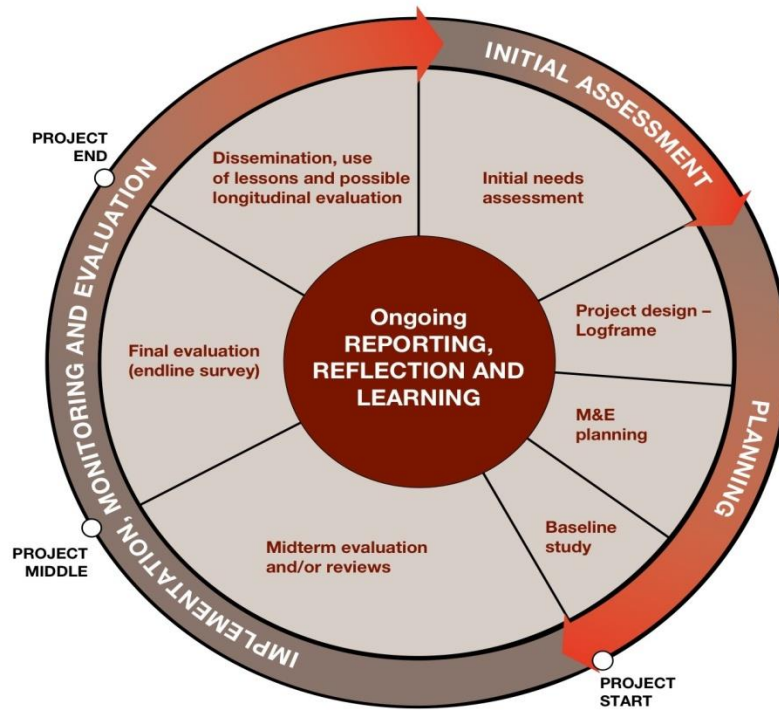
- ✓ Logical Framework Analysis (LFA),
- ✓ Environmental Impact Assessment (EIA),
- ✓ Social Impact Assessment (SIA) and
- ✓ Strength, Weakness, Opportunity and Threat (SWOT) analysis. But the most recommended techniques in this purpose should be
- ✓ Logical Framework Analysis (LFA).

3. M&E in Project Cycle Management

Step 1: Trainer needs to explain about M&E in Project Cycle Management by stressing why it is important to have M&E in the cycle? Trainer needs to explore the current understanding from the participants by asking questions for big group brainstorming before the trainer summarizing the definitions. After that trainer can show the graphic as in the Power Point of the session 3, M&E in PCM}

3.1. Definitions

M&E cycle is similar to Project Cycle Management (see graphic below) that started from Initial Assessment stage (addressing on initial needs assessment), Planning stage (Project Design Logframe, M&E Planning & Baseline study), then will arrive at Implementation, Monitoring & Evaluation stage (include Midterm evaluation and/or reviews, final evaluation/endline survey and dissemination, use of lessons and possible longitudinal evaluation). Organizations or institutions internally need to carry out reporting, reflection and learning as part of its organizational culture and practice.



3.2. Why M&E important in PCM?

A well-functioning M&E system is a critical part of good project/program management and accountability. While you implementing activities as indicated in your workplan, it is important to have regular monitoring and evaluation in order to provide timely and reliable M&E information to:

- Support project/program implementation with accurate, evidence based reporting that informs management and decision-making to guide and improve project/program performance.
- Contribute to organizational learning and knowledge sharing by reflecting upon and sharing experiences and lessons learned so that we can gain the full benefit from what we do and how we do it.
- Uphold accountability and compliance by demonstrating whether or not our work has been carried out as agreed and in compliance with established standards and with any other donor requirements.
- Provide opportunities for stakeholder feedback, especially beneficiaries, to provide input into and perceptions of our work, modeling openness to criticism, and willingness to learn from experiences and to adapt to changing needs.
- Promote and celebrate our work by highlighting our accomplishments and achievements, building morale and contributing to resource mobilization.

3.3. The differences between Monitoring & Evaluation

Step 2: Trainer will ask participants the key words between “M” and “E” what that means? Ask participants about what different between M and E are? Trainer may also want to discuss real term in local language and explore them with question of what and why?

- **Monitoring** is ongoing and tends to focus on what is happening. Monitoring data is typically used by managers for ongoing project implementation, tracking outputs, budgets, compliance with procedures, etc.
- **Evaluation** is a process of assessing whether the project has achieved its intended objectives. By drawing conclusions, evaluation intends to provide recommendations for the improvement on the future course of the project as well as lessons learned for other projects. Some big organizations use specific criteria when they do evaluation. Often, the main criteria assessed are efficiency, effectiveness and impact. Also, relevance and sustainability are usually included.

| | Monitoring | Evaluation |
|----------------------------------|---|---|
| Why? | <ul style="list-style-type: none"> ✓ Check progress, ✓ Inform decisions and remedial action, ✓ Update project plans, ✓ Support accountability | <ul style="list-style-type: none"> ✓ Assess progress and worth, ✓ Identify lessons and recommendations for longer-term planning and ✓ Organizational learning; ✓ Provide accountability |
| When? | Ongoing during project/program | Periodic and after project/ program |
| Who? | Internal, involving project/program implementers | Can be internal or external to organization |
| Link to logical hierarchy | Focus on inputs, activities, outputs and shorter-term outcomes | Focus on outcomes and overall goal |

In this session, trainer needs also talk about other terms being used such as Reviewing, Auditing, Reflection, Assessment etc., when most people talk about project management.

4. M&E System and Framework

Objective: After this session, participants/trainees will be able to understand key functions of M&E in a project or a program, its system and framework, and criteria for evaluation.

Material needed: Flipcharts, markers, handouts and LCD for PowerPoint presentation

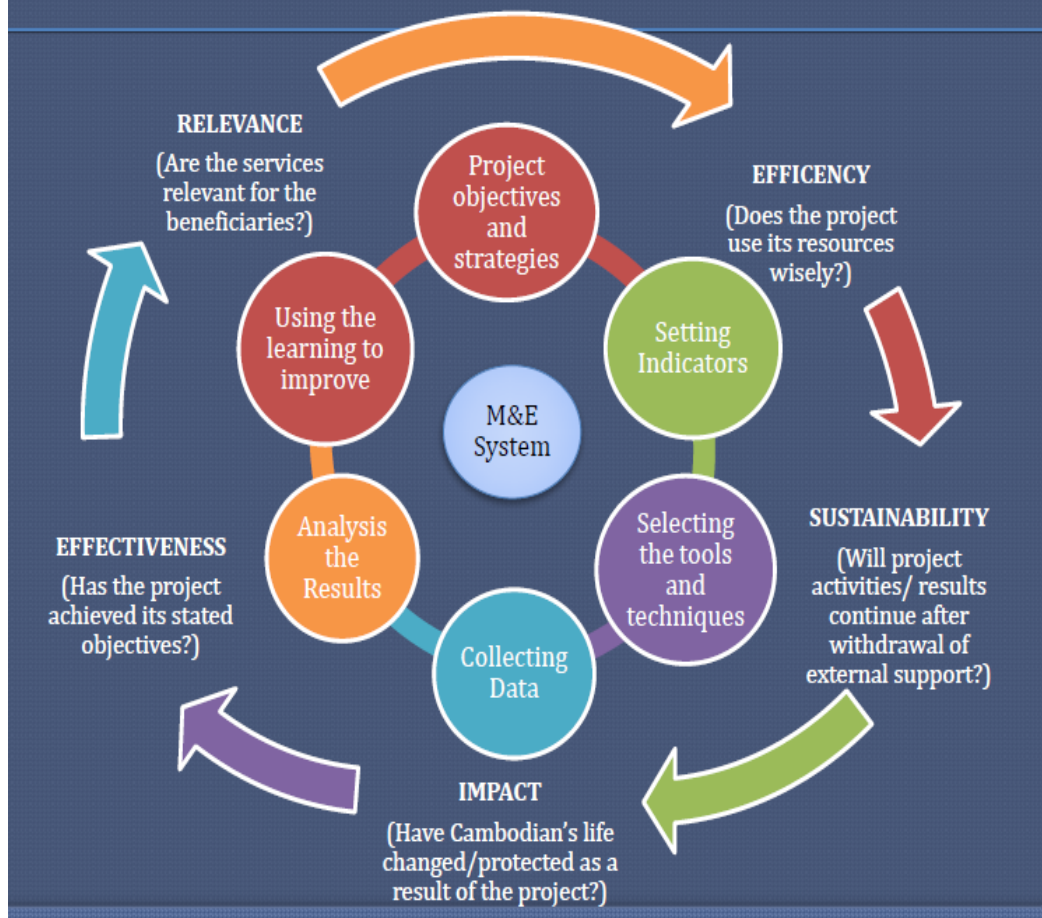
Time needed: About 115 mins

Steps:

Step 1:The Trainer shows the Image of a comprehensive M&E system and framework (below) of a program or project that needs to improve a certain situation in rural area of any particular sector of development. Facilitator/ trainer will explain the problem connection to vision and down flow to project design with logframe etc., and proposed numbers of inputs—outputs—outcomes—impacts, and the whole picture of required monitoring and tracking system. (See Slide Presentation No 40)

- M&E needs to be understood as an integrated reflection and communication system within the project that must be planned, managed and resourced and utilized it.
- A well-functioning M&E system helps guide the intervention strategy and ensure effective operations for all key stakeholders. It is one part of the overall management of the project. Each stage of the project cycle requires certain key M&E tasks to be carried out by specific stakeholders.
- A detailed M&E plan is developed during project start-up and needs to be documented clearly and shared with those who are to implement it. The M&E system will itself need to be monitored and updated regularly during the life of the project.

Comprehensive View of M&E System



The M&E system has two layers which are (see graphic above):

Inner cycle is about Monitoring, which involves 6 steps

- 1. Identify Project Objectives and Strategies:** This part could be referred to project design/planning stage. If it is not clearly developed during planning or design stage, this time M&E officer and management staff need to determine it.
- 2. Setting Indicators:** This part is also referred to the project design/planning stage that organization or institution had developed especially indicators and targets or milestones that the project or program wants to be achieved.
- 3. Selecting the Tools and Techniques:** There are several tools and techniques which are used for data collection including Participatory Rural Appraisal (PRA) or Rapid Rural Appraisal (RRA),

Agri-Ecosystem Analysis (AEA) tools etc. Those tools could be used either a participatory or empowerment way depends on thematic issues, context of the project or program.

4. **Collecting Data:** data collection which is referred to secondary and primary data collection using tools and techniques above. Team of data collectors, data enumerators, data entry and interpreters must be mobilized and worked.
5. **Analyze the Results:** Once the data are collected or collated, then data need to be analysed and written in a narrative way and easy to understand by all stakeholders.
6. **Use the Learning to Improve:** After all findings are presented key lessons needed to be taken and learned to improve next phase of project or program design/planning again.

Outer cycle is about Evaluation, which involves 5 key criteria for any project evaluation:

1. **Relevance:**The extent to which the objectives of a project are consistent with the target group's priorities and the recipient and donors' policies. The assessment will look at the project's services is met or responded to beneficiaries needs.
2. **Effectiveness:** The assessment will look at whether the project or program has achieved its stated objectives and goal during that setting timeframe (or life cycle of the project).
3. **Efficiency:** The assessment will look at how the organization or project staff had utilized resources to achieve such particular objectives and goal. Sometime misused of funds or materials resources were not make the project or program successful.
4. **Sustainability:** The assessment will look at the perception or views of beneficiaries and other stakeholders related to whether or not the project or program can be sustainable after the project completion or after the project phased out from that area.
5. **Impact:** The assessment will look at the positive changes arising from the project or program including change in behaviors, practices, change in living condition and change in policies.

To assess or evaluate the project or program, the evaluator/ evaluation team will use different tools and techniques for data collection, semi-structure interview and focus group discussion and self-assessment forms. Some support documents such as financial reports could be also helpful to verify the use of funds (expenses) for the project implementation/activities.

4.1. Elements of a good M&E system

Step 2: The Trainer starts to brainstorm participants in general on what should be a good M&E system?

There are five elements of good M& E system, including:

- 1) A capable Monitoring and Evaluation staff unit: The organization should have a separate M&E Unit/ Department which has number of staff in charge of this unit/department.
- 2) Clear goals and objectives of the project:The organization is always have set clear goal and objectives for its mandate and have aligned to the rest of project/ program that it will operate throughout the period of time.
- 3) A core set of indicators and targets: All programs or projects needcore set of indicators and clear targets to be achieved in each semester or annually. These indicators and targets are found in the program or project logframe.
- 4) A plan for data collection and analysis: As becoming as a mandatory, all programs or projects#-require data collection and analysis to set their indicators and targets in a smart and reliable way. So that data collection and analysis plan must be part of its priority and data collection should be done during baseline survey/ assessment.
- 5) A plan for data dissemination:~~One~~ Once the data collection, analysis and report are completed, the organization needs to disseminate that result to relevant stakeholders, project partners and its donors.

Good and Not Good M&E system can be as shown in the table below:

| M&E Unit | |
|---|--|
| Not So Good | Good |
| <ul style="list-style-type: none"> • No functioning unit for M&E in the organization/ Ministry/ department • 1 or 2 persons responsible for the whole country • Very limited resources for M&E • No formalized links with technical and other resources | <ul style="list-style-type: none"> • Established M&E unit within the Department, Ministry and organization • Specific expertise in or affiliated with the unit: (M&E, behavioral, statistics, data dissemination) • Budget (10% of the national/overall budget) • Formalized links with the research/ academic institutions, leading NGOs and donors |
| Clear Goal and Objectives of program/project | |
| <ul style="list-style-type: none"> • National strategic plan has no specific goal and objectives • No system of ongoing assessment with programs/projects reviews and built-in evaluation • Limited coordination with districts and provincial level • Limited coordination between sectors | <ul style="list-style-type: none"> • Well-defined national, regional program, programme, project goals and targets (M&E plan) • Regular reviews/evaluations of the progress of the implementation of the national program, programme, project plans • Guidelines and guidance to programme, project,districts and or provinces for M&E |

| | |
|---|--|
| <ul style="list-style-type: none"> • Donor-driven M&E system | <ul style="list-style-type: none"> • Guidelines for linking M&E to multiple sectors • Co-ordination of national and donor M&E needs |
| A Set of Indicators and Targets | |
| <ul style="list-style-type: none"> • No indicators or indicators that cannot be measured • Indicators that cannot be compared with past indicators or with other countries • Indicators are only used for donors and each donor has its own set of indicators • Indicators are irrelevant to those who collect the data • Each sector uses its own indicator | <ul style="list-style-type: none"> • A set of prioritized indicators and additional indicators that cover program monitoring, program outcomes and impact - M&E plan • Selection of indicators through process of involving multiple stakeholders and maintaining relevance and comparability • Utilization of past and existing data collection efforts to assess national trends. |
| A plan for data collection and analysis | |
| <ul style="list-style-type: none"> • M&E is an ad-hoc activity without a plan, mostly driven by donors • Data are collected but not analyzed sufficiently / utilized • There is no systematic monitoring of program inputs and outputs. | <ul style="list-style-type: none"> • An overall national level data collection and analysis plan, linked to the national strategic plan • A plan to collect data and analyze indicators at different levels of M&E (program monitoring) • Second generation surveillance, where behavioral data are linked to surveillance data. |
| A plan for data dissemination | |
| <ul style="list-style-type: none"> • Dissemination is ad hoc and not planned or coordinated • Annual surveillance report is much delayed not user friendly and not well disseminated • Dissemination to the districts and regions is not done • Dissemination activities are donor driven | <ul style="list-style-type: none"> • Overall national level data dissemination plan • Well-disseminated informative annual report of the M&E unit • Annual meetings to disseminate and discuss M&E and research findings with policy-makers and planners • Clearinghouse / Resource centre at national level |

4.2. Tasks in Monitoring and Evaluation (M&E)

Step3: Trainer will need to explain the tasks of M&E (which is not a separate word) in any project or program implementation. Because once it become a system, then these tasks of M&E will also compulsory for organization, especially staff in charge of M&E unit.

A. Tasks in M&E: There are six tasks in monitoring (based on International Fund for Agriculture Development- IFAD, 2002), includes:

- **Task 1: Early Design Phase (Formulation & Approval)**
 - 1) Setting scope & purpose

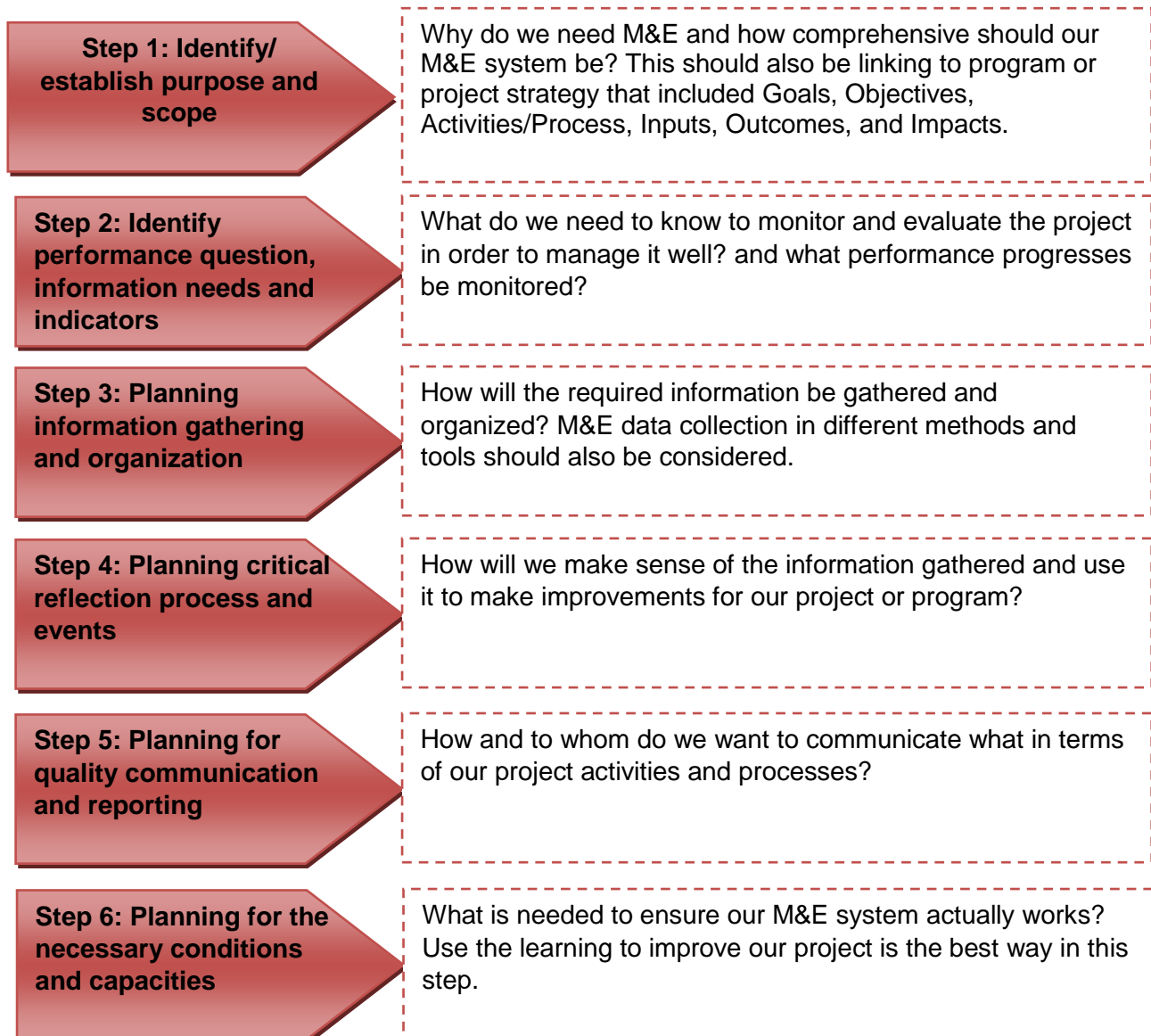
- 2) Setting key performance questions, indicators and mechanisms
 - 3) Identify organizational arrangement for M&E
 - 4) Indicative M&E budget
 - 5) Document the above as M&E framework
- **Task 2: Start-up prior to project funding (with special operating fund)**
 - 6) Review the key performance questions, indicators, monitoring mechanisms, and project strategy
 - 7) Initiate baseline study
 - 8) Train few potential staff on M&E
 - 9) Prepare Project Implementation Plan (PIP) with few key staff
 - **Task 3: Start up after project funding**
 - 10) Review project design in relation to M&E with the key stakeholders
 - 11) Prepare detailed M&E Plan according to the partnership arrangements
 - 12) Put in place required manpower, capacity and conditions for M&E implementation
 - **Task 4: During project implementation**
 - 13) Ensure management has required information
 - 14) Facilitate regular review meetings/communication with implementers
 - 15) Prepare annual reviews and support supervision missions
 - 16) Conduct focus studies or emergency issue
 - 17) Communicate results to the stakeholders
 - **Task 5: Midterm Review (MTR) or Evaluation**
 - 18) Facilitate MTR or evaluation internal or external process
 - 19) Assist in response to the MTR or evaluation feedback
 - 20) Assist in project plan/ design review as per MTR or evaluation recommendations
 - 21) Adjust the M&E system if needed
 - **Task6: Project phase-out or completion**
 - 22) Conduct end-of-project evaluation and/or impact study
 - 23) Find out how the impacts will be sustained
 - 24) Hold workshop and do field studies
 - 25) Articulate lessons learned for the next phase or other projects

4.3. Key steps in setting M&E system

Step 4: The trainer will have some break before going into M&E system and process which involves other steps also when developing M&E system.

There are six steps in setting up M&E system:

After, explaining about task of M&E, now, The Trainer need to explain participants about steps in setting up M&E system.



4.4. Key Criterion for Monitoring and Evaluation (M&E)

Step 5:The Trainer should ask participants to brainstorm on what should be key criteria for evaluation? Then facilitator/ trainer should show the slide for Evaluation’s criteria commonly used by international and national organizations in the world, after all, the Trainer will explain that:

- Most development organizations (national, international and UN agencies) use the Development Assessment Criteria (DAC) which is adopted from the Organization for Economic Co-operation and Development (OECD).
- DAC uses 5 key evaluation criteria below.
- Each development organization typically uses its own definition for the criteria

1) **Relevance:**

Is the extent to which the aid/assistance activity is suited to the priorities and policies of the target group, recipient and donor?

2) **Effectiveness:**

Is the extent to which an intervention has or is likely to achieve its intended, immediate results?

3) **Efficiency:**

Is defined as the extent to which results have been delivered in the least costly manner possible – a measure of how economically resources/inputs (funds, expertise, time, etc.) are converted to results.

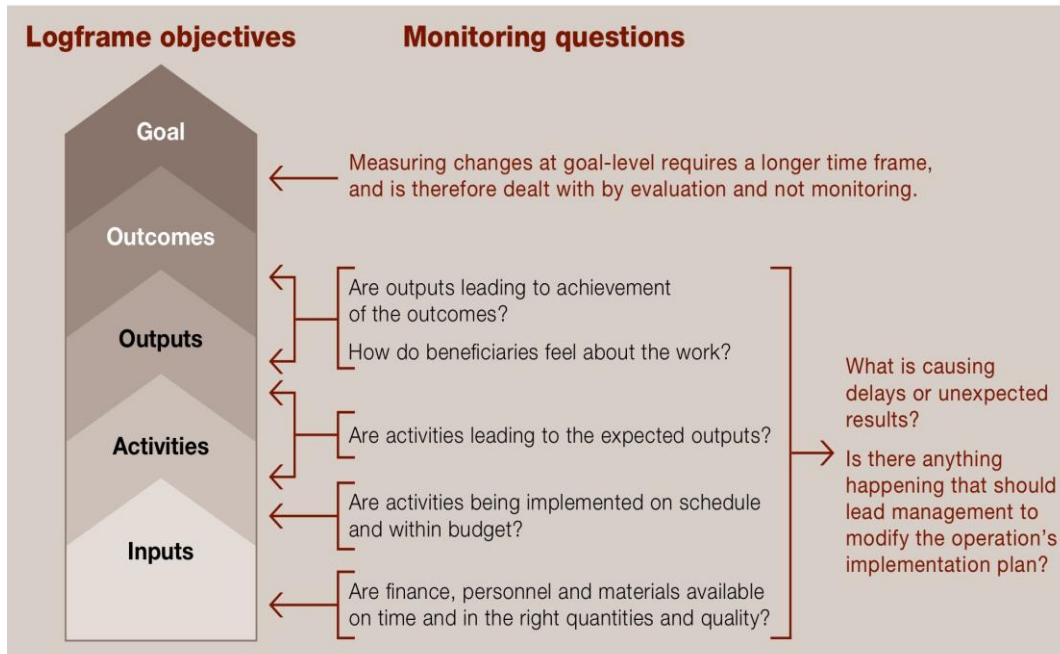
4) **Impact:**

Is the positive and negative changes produced by a development intervention, directly or indirectly, intended or unintended. This involves the main impacts and effects resulting from the activity on the local social, economic, environmental and other development indicators. The examination should be concerned with both intended and unintended results and must also include the positive and negative impact of external factors, such as changes in terms of trade and financial conditions.

5) **Sustainability:**

Is the ability to generate results after the external support has been discontinued? While a project is limited by time, the benefits should continue and the activities should be developed and/or improved further long after the project has ended, without the need for external inputs.

Some key questions and data sources related to Monitoring²

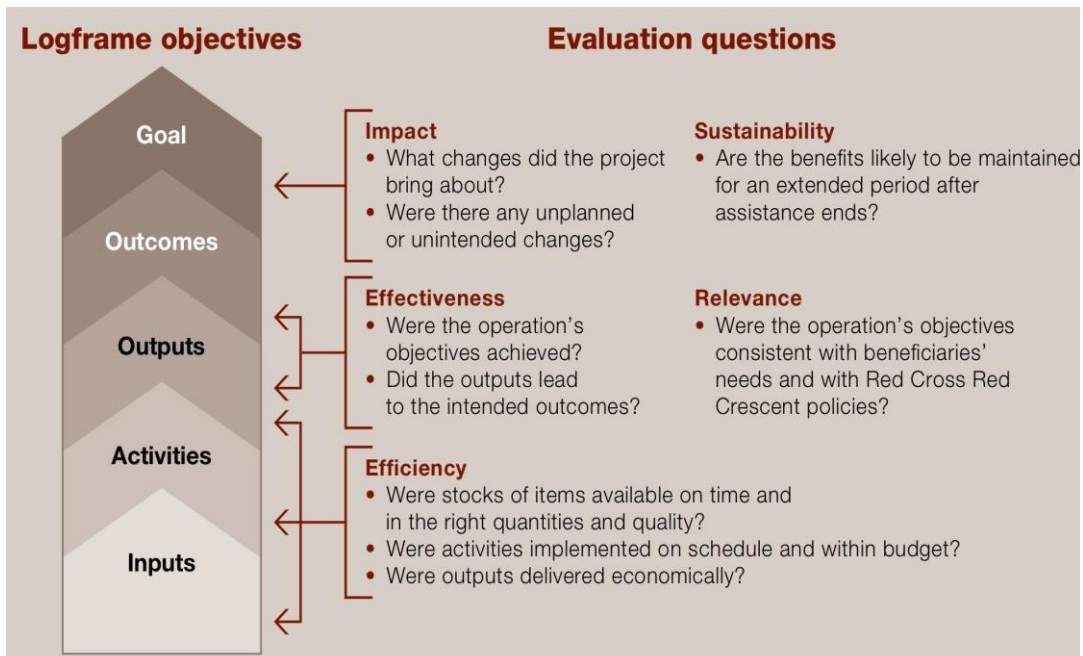


These questions are addressing at the input, activities and outputs level. The key questions are:

1. Are finance, personnel and materials available on time and in the right quantities and quality?
2. Are activities being implemented on schedule and within budget?
3. Are activities leading to expected outputs?
4. How do beneficiaries feel about the work?
5. Are outputs leading to achievement of the outcomes?

²IFRC Project/Program M&E Guide, 2011, P11

Some key questions and data source related to Evaluations³



These questions are addressing at the input, activities and outputs level. The key questions are:

1. Were outputs deliveries economically?
2. Were activities implemented on schedule and within budget?
3. Were stocks of items available on time and in the right quantities and quality?
4. Did the outputs lead to the intended outcomes?
5. Were the operation's objective achieved?
6. Were there any unplanned or unintended changes?
7. What changes did the project bring about?
8. Are the benefits likely to be maintained for an extended period after assistance ends?
9. Were the operation's objectives consistent with beneficiaries' needs?

4.5. Planning and Steps for Project Monitoring & Evaluation (PME)

Step 6: The Trainer need to provide clear explanation on the planning and steps for PME, which including 6 steps as following:

A. Steps in Project Monitoring

- Step 1: Identify Project Objectives and Strategies: Specify the Intervention (Goals, Objectives, Activities/Process, Inputs, Outcomes, and Impacts)

³IFRC Project/Program M&E Guide, 2011, P14

- Step 2: Setting Indicators: Needs of Information, Performance Monitoring and SMART⁴ Indicators
- Step 3: Selecting the Tools and Techniques: Select strategy for M&E Data collection in different methods from existing and new sources.
- Step 4: Collecting Data: Set baseline and realistic Targets for Objectively Verifiable Indicators (OVI) of performance
- Step 5: Analyse the Results: Design and Implement Monitoring tools/system (manual and computerized)
- Step 6: Use the Learning to Improve: Use of monitoring data in project Evaluation, Planning, Management and Reporting.

B. Steps in Project Evaluation

Step 7: The Trainer needs to draw participant attention on the 5 steps for Project Evaluation that is part of the Roles and Responsibilities of the M&E Unit/ Department. Evaluation steps are included:

- Step1: Implementing M&E Plan: Knowing when should midterm and final term evaluation be started for your program/project
- Step2: Develop clear Terms of References (TORs) and budget for evaluation: This is an important job. Without clear TORs and enough budget allocation to evaluation, the organization will not know the progress, development and impacts of the project. ~~and event cannot closing the project.~~
- Step3: Recruit qualified external consultant or team of consultant: ~~Prior to carry out evaluation task based on your agreed TORs, terms and conditions.~~
- Step4: Coordinate/ facilitate consultant or team of consultant: Your M&E Unit/Department staff will facilitate consultant team to perform the task including assisting in logistic arrangement (contact key informants, beneficiaries groups, stakeholders etc.,)
- Step5: Take actions / recommendations for next implementation phase: After report is concluded and finalized, your organization and management team will need to consider and take appropriate actions from the report's recommendations and for development of next phase/ cycle of the project.

Before finish session 4 on M&E system, the Trainer needs to ask participants again and again if there is something or key points that they do not understand and trainer needs to make it clarified again.

⁴ SMART= Specific, Measurable, Achievable/Attainable, Realistic/Result-Oriented and Time-bound

5. Database Management System (DMS)

Objective: After this session, participants/trainees will be able to understand key functions of database management system in supporting M&E to be effective and efficient implementation for any project or program.

Material needed: Flipcharts, markers, handouts and LCD for PowerPoint presentation

Time needed: About 155minutes

Steps:

Step 1: The Trainer needs to assist participants/ trainees to review their knowledge and understanding on database by asking what database and what the DMS are, why this DMS important through brainstorming in the classroom.

5.1. What is DMS?

A Database Management System (DMS) is system software for creating and managing databases for any project. The DMS provides users with a systematic way to create, retrieve, update and manage data for your projects or program. Your database can be stored, modified and extracted information for any purposes.

5.2. Why DMS is important in Project Cycle Management?

A database management system is important because it manages data efficiently and allows users to perform multiple tasks easily. A database management system stores, organizes and manages a large amount of information within a single software application.

5.3. How to do it? Some suggested tools as follow:

Step2: The trainer needs to ask participants if they have heard something about database software before and also encourage them to explain what database software is for and its usefulness. ~~how they feel it is useful?~~

Based on what kinds of information or data you need, you can enter, store and process data using different software or Microsoft application.

Those recommended software applications are:



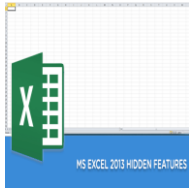
SPSS is a short acronym from “Statistical Package for the Social Sciences” that this is widely used among research organization/ institutions. SPSS software can be allowed for storing different file types, survey coding, data entry, and data analysis or interpretation.



SMART SHEET: Smart sheet is a software program that is an intuitive online project management tool enabling teams or organization to increase productivity using cloud, collaboration & mobile technologies. Smartsheet is allowing you to keep track of your project on Tasks, start date, end date, duration, predecessor, % complete, assign to, at risks and timeframe (years of implementation). You can get it from <https://app.smartsheet.com/b/home>



Microsoft Access: MS Access is a database management system (DMS) from Microsoft that combines the relational Microsoft Jet Database Engine with a graphical user interface and software-development tools. MS Access has similar function to Smartsheet that allow you to keep track of your program or projects with different contents in the Software. These contents can be starting access, creating a new database, opening an existing database, importing data from other applications, and compacting your database.



Microsoft Excel: MS Excel can be also used for documenting, storing data or statistic that is required by your organization/ institution. You can use MS Excel for workplan and budget formulation and is easy for keep track on your project implementation and M&E.

Step2: Trainer needs also explain participants that each of software will be used in different purposes in order to help project manager and staff easy to control, to operate and track any progress of the project implementations. Trainer also needs to illustrate that learning each database (e.g. SPSS) will require another 1 or 2 weeks to be able to work on it effectively that includes data entry, data coding, data analysis and data interpretation and writing etc.,

Before finish off this session, trainer also needs to check participants if anyone really want to study on any of these presented tools or for other tools.

6. M&E Approaches

Objective: After this session, participants will be able to understand and adopt some of the approaches and tools and identify appropriate indicators of M&E for the organization

Material needed: Flipcharts, markers, handouts and LCD for PowerPoint presentation

Time needed: About 60 minutes

Steps:

Step 1: Explain to participants that there are many approaches/methods and tools have been developed and used by organizations and they've been used differently. Design and use M&E depends on the intended purpose. After that, trainer can list some of the core approaches used by IFAD, as an example:

There are different kinds of M&E approaches and tools. All methods were classified in different sectors. Totally there were up to 34 methods of M&E (IFAD, Annex D). However, the core methods recommended are:

- (1) stakeholder analysis,
- (2) documentation review,
- (3) biophysical measurements,
- (4) direct observation,
- (5) cost-benefit analysis,
- (6) questionnaires and surveys,
- (7) semi-structure interviews, and
- (8) case studies with best practitioners, model farmers etc.,

UN agencies and USAID and other international NGOs working on environment, poverty alleviation and emergencies recommended the use of logframe analysis (LFA) as the basis to work for results- based management and effective M&E tool.

6.1. Utilizing Logical Framework Approach (LFA)

Step2: Trainer needs to ask participants of the LFA and please also refer back to the module 2 of the Project Cycle Management course.

Trainer will also assist participants/trainees to revisit about LFA that:

“ The Logical Framework or Logframe in short, is one of the principal tools used by the international development organizations to help design projects to achieve measurable and realistic results. It was pioneered for USAID in the 1970s and has since been widely adopted by multilateral and bilateral agencies, NGOs, governments and implementers”. The Logframe is useful to both managers and evaluators at every stage of the project cycle. It is a vehicle for organizing a large amount of information in a coherent and concise manner, assisting with the design, implementation and evaluation of projects (USAID, 2012).Formulation of a logframe involves a systematic analysis of the different components of a project. It is a stepwise and logical process including:

- Step 1: Define a goal
- Step 2: Formulate set of objectives
- Step 3: Determine the outputs (expected results)
- Step 4: Describe the activities (inputs)

ThisLogframe is detailed in Project Cycle Management (PCM) course, (Re **Module 02**).

6.2. Understanding about Indicators

Step 3: Ask participants to brainstorm on “What is an indicator?” Let them answers and write down on flip charts what participants said. After that giving some definition as following:

Indicators are measure of progress or lack of progress used to assess progress towards meeting stated objectives. An indicator should provide, where possible, a clearly defined unit of measurement and a target detailing the quantity, quality and timing of expected results (AusAID, 2005).

For example:

- Number of youth who participate in vocational training
- Number of communities where the program has operated
- Number of partner staff members who attend training
- Percentage of the population who live below the poverty line
- Percentage of employment or unemployment of a particular group of the population
- Number of training or workshop conducted
- Number of promotional campaign materials (e.g. poster, fliers...) distributed
- Percentage of the population who are literate or illiterate
- Number or percentage of the population who are infected by a particular disease (e.g. HIV/AIDS)

Please make the participant know that “Indicators” need to be SMART or CREAM:

- ✓ S = Specific
- ✓ M = Measurable
- ✓ A = Achievable or Attainable
- ✓ R = Realistic or Result Oriented
- ✓ T = Time-bound

Or

The “CREAM” of Good Performance Indicators

- ✓ Clear = Precise and unambiguous
- ✓ Relevant = Appropriate to subject at hand
- ✓ Economic = Available at reasonable cost
- ✓ Adequate = Sufficient to assess performance
- ✓ Monitorable = Amenable to independent validation

Talking about Project Indicators and its formulation of indicators, please refer to PCM course **Module 02**.

6.3. M&E Planning and Implementing or launching

Step 3: The Trainer to explain about M&E planning and implementation. Because it linking the commitment of organization and also budgeting for M&E works (see table below).

It is best to begin systematically planning the M&E and related budget early in the project/program design process so that adequate funds are allocated and available for M&E activities.

| No | Description | Responsible | When | Cost (USD) |
|----|------------------------|-------------------------|------------|------------|
| 1 | Baseline survey | M&E Officer, | XX/XX/XXXX | \$ |
| 2 | Monthly report | Project Manager/officer | XX/XX/XXXX | \$ |
| 3 | Quarterly report | M&E Officer | XX/XX/XXXX | \$ |
| 4 | Annual report | ED/CEO | XX/XX/XXXX | \$ |
| 5 | Midterm evaluation | M&E Consultant | XX/XX/XXXX | \$ |
| 6 | Final Evaluation | M&E Consultant | XX/XX/XXXX | \$ |
| 7 | Capacity Development | HR Manager | XX/XX/XXXX | \$ |
| 8 | Context monitoring | M&E officer | XX/XX/XXXX | \$ |
| 9 | Beneficiary monitoring | M&E officer | XX/XX/XXXX | \$ |
| 10 | Donor report | ED/CEO | XX/XX/XXXX | \$ |

- Itemize M&E budget needs:** If M&E planning is done systematically, identifying key steps and people involved, detailing budget items should be straightforward. Start by listing M&E tasks and associated costs. A planning table for key M&E activities can be prepared to guide the process. If there is a required format for itemizing budget items – e.g. within the implementing organization or from the donor – adhere to the format or an agreed-upon variation. Otherwise, prepare a spreadsheet clearly itemizing M&E expenses. It is particularly important to budget for any “big-ticket items”, such as baseline surveys and evaluations. Examples of budget main items categories are Human resources and Capital expenses and these should be further broken down. Matching the spreadsheet, a description justifying each line item can help guard against unexpected budget cuts.

This M&E budget session is already covered in Module 2 (Please check it again)
- Incorporate M&E costs into the project/program budget:** Costs associated with regular project/program monitoring evaluations should be included in project/program budget, rather than as part of the organization’s overhead (organizational development or administrative costs). Therefore, the actual cost of a project/program will be reflected in the budget.
- Review any donor budget requirements and contributions:** Identify any specific budgeting requirements from the funding agency or implementing organization. If multiple funding sources are utilized, ensure the budget is broken down by donor source. Determine if there are any additional costs the donor(s) will or will not cover, such as required evaluations,

baseline studies, etc. Check with your finance unit or officer to ensure the budget is prepared in the appropriate format.

- **Plan for cost contingency:** Contingency costs in the M&E system refer to unexpected costs that may arise during project/ program implementation of M&E. It is important to plan for unexpected contingencies such as inflation, currency devaluation, equipment theft or need for additional data collection/analysis to verify findings. Although budget planning seeks to avoid these risks, unexpected expenses can arise.

7. M&E Report

Objective: After this session, participants will be able to understand and adopt some of the report template to use in their organization

Material needed: Flipcharts, markers, handouts and LCD for PowerPoint presentation

Time needed: About 120 mins

Steps:

Step 1: Explain to participants there are many report formats or templates that have been adopted and used by different organizations. Show participants some slides on the report format such as:

7.1. What is M&E report?

M&E report is a process that writing up the collected data, key analysis about the project achievements related to socio-economic, political situation and especially on the achievements against expected outputs, outcomes and impacts stated in the project or program documents. It will help improve current and future performance for your organization.

7.2. Why is it important to have M&E report?

M&E reporting is the most important and required by both external donors and internal organization (Should we include the target group here as well?) to inform decision and stakeholders about project or program achievements.

7.3. Process of Reporting and Dissemination

Step 2: The Trainer needs to explain step by step the process for writing report on M&E. There are 4 steps in M&E reporting and dissemination process. ~~def-related subject~~ (see below with each detail).

Having defined the project/program's informational needs and how data will be collected, managed and analyzed, the next step is to plan how the data will be reported as information and put to good use. Reporting is the most visible part of the M&E system, where collected and analyzed data is presented as information for key stakeholders to use. Reporting is a critical part of M&E because no matter how well data may be collected and analyzed, if it is not well presented it cannot be well used – which can be a considerable waste of valuable time, resources and personnel. Writing report should be focus on:

- 1) Identify the specific reporting needs/audience: Reports should be prepared for a specific purpose/audience. This informs the appropriate content, format and timing for the report. For example, do users need information for ongoing project/program implementation, strategic planning, compliance with donor requirements, evaluation of impact and/or organizational learning for future project/programs?

Why do we need to understand about report audience (internal and external audience)?

Internal versus external reporting

| Internal Reporting | External Reporting |
|---|---|
| <u>Primary audience</u> is the project/program team and the organization in which it operates. | <u>Primary audience</u> is stakeholders outside of the immediate team/organization (e.g. donors, beneficiaries, partner organizations, international NGOs, and governments). |
| <u>Primary purpose</u> is to inform ongoing project management and decision-making (monitoring reporting). | <u>Primary purpose</u> is typically for accountability, credibility, to solicit funds, celebrate accomplishments and highlight any challenges and how they are being addressed. |
| <u>Frequency</u> is on a regular basis according to project monitoring needs. | <u>Frequency</u> is less often in the form of periodic assessments (evaluations). |
| <u>Content</u> is comprehensive in content, providing information that can be extracted for various external reporting needs. | <u>Content</u> is concise, typically abstracted from internal reports and focused on communication points (requirements) specific to the targeted audience. |
| <u>Format</u> is typically determined by the project team according to what will best serve the project/program needs and its organizational culture. | <u>Format</u> is often determined by external requirements or preferences of intended audience. |

- 2) Determine the reporting frequency: It is critical to identify realistic reporting deadlines. They should be feasible in relation to the time, resources and capacity necessary to produce and distribute reports including data collection, analysis and feedback. Some key points to keep in mind in planning the reporting frequency:
 - a. Reporting frequency should be based upon the informational needs of the intended audience and donor's requirement as agreed in the Project Proposal (if any), timed so that it can inform key project/program planning, decision-making and accountability events.
 - b. Reporting frequency will also be influenced by the complexity and cost of data collection. For instance, it is much easier and affordable to report on a process indicator for the number of workshop participants than an outcome indicator that measures behavioral change in a random sample, household survey (which entails more time and resources).
 - c. Data may be collected regularly, but not everything needs to be reported to everyone all the time.
- 3) Determine specific reporting formats: Once the reporting audience (who), purpose (why) and timing (when) have been identified, it is then important to determine the key

reporting formats that are most appropriate for the intended user(s). This can vary from written documents to video presentations posted on the internet. Sometimes the reporting format must adhere to strict requirements, while at other times there can be more flexibility. See an example of International Federation of Red Cross & Red Crescent Society (IFRC) report format below:

Example of International Federation of Red Cross & Red Crescent Society (IFRC) Report Format/ Contents:

1. **Project/program information.** Summary of key project/program information, e.g. name, dates, manager, codes, etc.
2. **Executive summary.** Overall summary of the report, capturing the project status and highlighting key accomplishments, challenges, and planned actions. Also includes the Federation-Wide Reporting System (FWRS) indicators for people reached and volunteers.
3. **Financial status.** Concise overview of the project/program's financial status based on the project/program's monthly finance reports for the reporting quarter.
4. **Situation/context analysis (positive and negative factors).** Identify and discuss any factors that affect the project/program's operating context and implementation (e.g. change in security or a government policy, etc), as well as related actions to be taken.
5. **Analysis of implementation.** Critical section of analysis based on the objectives as stated in the project/program's logframe and data recorded in the project/program Indicator Tracking Table (ITT).
6. **Stakeholder participation and complaints.** Summary of key stakeholders' participation and any complaints that have been filed.
7. **Partnership agreements and other key actors.** Lists any project/program partners and agreements (e.g. project/program agreement, MoU), and any related comments.
8. **Cross-cutting issues.** Summary of activities undertaken or results achieved that relate to any cross-cutting issues (gender equality, environmental sustainability, etc).
9. **Project/program staffing – human resources.** Lists any new personnel or other changes in project/program staffing. Also should include whether any management support is needed to resolve any issues.
10. **Exit/sustainability strategy summary.** Update on the progress of the sustainability strategy to ensure the project/program objectives will be able to continue after handover to local stakeholders.
11. **PMER status.** Concise update of the project/program's key planning, monitoring, evaluation and reporting activities.
12. **Key Lessons.** Highlights key lessons and how they can be applied to this or other similar projects/programs in future.
13. **Report Annex.** Project/program's ITT and any other supplementary information.

- 4) Identify people responsible for reporting products: It is important to specifically identify the people who will be responsible for each type of report. This can be the same person identified in the M&E plan who collects indicator data, or it may be another person who specifically prepares the data to communicate to others.

7.4. Characteristic of good M&E reporting

Step 3: The Trainer will also need to give the characteristic of GOOD M&E report that included:

- a) Relevant and useful: Reporting should serve a specific purpose/use. Avoid excessive, unnecessary reporting – information overload is costly and can burden information flow and the potential of using other more relevant information.
- b) Timely: Reporting should be timely for its intended use. Information is of little value if it is too late or infrequent for its intended purpose.
- c) Complete: Reporting should provide a sufficient amount of information for its intended use. It is especially important that reporting content includes any specific reporting requirements.
- d) Reliable: Reporting should provide an accurate representation of the facts.
- e) Simple and user-friendly: Reporting should be appropriate for its intended audience. The language and reporting format used should be clear, concise and easy to understand.
- f) Consistent: Reporting should adopt units and formats that allow comparison over time, enabling progress to be tracked against indicators, targets and other agreed-upon milestones.
- g) Cost-effective: Reporting should warrant the time and resources devoted to it, balanced against its relevance and use (above).

8. Post-Test and Evaluation

8.1. Post test and evaluation

Step1:The Trainer informs the participants about M&E Post Test and distributing Post test form and after 15-20 minutes of time to fill in, the Trainer will also need to distribute Evaluation's form to all participants to evaluate whole training sessions on M&E.

8.2. Wrap up the M&E session, provide certificate and closing the training

Step2:The Trainer, after all post test and evaluation forms are completed, starts to summarize of what they all have learned from the session 1 to 8(the last session) and also indicates some points in the evaluation or feedback collected from the participants. The Trainer also may ask for any open Q&A as a final opportunity for participants/trainees to share in this training.

The Trainer, then addresses the final wish and congratulation to all participants who have attended the training successfully. If there is certificate ready for participants, then The Trainer should also need to keep sometime (the last session) for donor's representative or Dean of University to honor the certificates award ceremony too.

9. Reference page

9.1. Session Plan for the M&E module

M&E module Objectives:

- The participants/trainees will learn and understand M&E system, key elements and functions for project monitoring & evaluation. In addition, participants will also learn about Database Management System (DMS) that are supportive to the M&E related work in the organization.
- The participants will gain a deeper understanding and able to apply some methods and tools for effective project/program monitoring & evaluation, in relation to their areas of work, through discussion in plenary, questions and answers, learning reflection and group work.
- The participants/trainee can discuss and share good practices on M&E reporting and other practical issues happening in their day to day work

| Sessions | Contents | Objectives | Methodologies | Training Materials | Time Required |
|---------------------------------------|--|--|---|---|---|
| 1. General Introduction & Orientation | <ul style="list-style-type: none"> - Registration, - Self-introduction - Objectives orientation and - Course contents of PME | <ul style="list-style-type: none"> • To provide opportunity for participants/trainees to know each other, clarify expectations and orientation to the course objectives | <ol style="list-style-type: none"> 1. Welcome & Introduction: Welcome by the organizer and short opening remark 2. Self introduction of participants/trainees and orientation to the training objectives. 3. Show course contents 4. Pre-test | Banner, name tags, Slide presentation Pre-test sheet for module 4 | 60 mins |
| 2. Overview of M&E module | <ul style="list-style-type: none"> • What is project PME? • Why is PI important in PME? • How to ensure obtaining effective | <ul style="list-style-type: none"> • To the participants an overall picture of M&E module, the important of M&E and the recommended | <ol style="list-style-type: none"> 1. Give overall picture on Project Cycle Management (esp. related to M&E stage) 2. Explain each key | <ul style="list-style-type: none"> • Slide Presentation • Handout • Laptop • LCD projector • Pointer | 90 mins <ol style="list-style-type: none"> 1. 15 mins 2. 60 mins 3. 15 mins |

| Sessions | Contents | Objectives | Methodologies | Training Materials | Time Required |
|--|---|--|---|---|--|
| | PME? <ul style="list-style-type: none"> Recommended tools and/or techniques to be used in PME | tools to be used | word and reflect to practical issue, local language etc., 3. Let participants/trainees talk and explain their own language | <ul style="list-style-type: none"> Flip charts Markers Color papers | |
| 3. M&E in Project Cycle Management (PCM) | <ul style="list-style-type: none"> Definitions Why M&E important in PCM? The differences between Monitoring & Evaluation | <ul style="list-style-type: none"> To provide knowledge to the participants on key elements and terms being used for Monitor and Evaluate, the differences between M & E | <ol style="list-style-type: none"> Give clear definitions of M&E, the important, and Explain the differences of M&E | <ul style="list-style-type: none"> Slide Presentation Handout Laptop LCD projector Pointer Flip charts Markers Color papers | 65 mins <ol style="list-style-type: none"> 15 mins 20 mins 30 mins |
| 4. M&E System and Framework | <ul style="list-style-type: none"> Elements of a Good M&E system (include Good and not good M&E system) Tasks in M&E Steps in M&E Key Criteria for Evaluation | <ul style="list-style-type: none"> To strengthen understanding among participants/trainees on key functions of M&E in a project or a program, its system and framework, criteria for evaluation | <ol style="list-style-type: none"> Show the comprehensive view of the M&E system to participants/trainees (see the Slide Presentation) Explain the contents including tasks, steps and criteria Let participants/trainees talk about their own M&E | <ul style="list-style-type: none"> Slide Presentation Handout Laptop LCD projector Pointer Flip charts Markers Color papers Printed Monitoring steps in A4 paper | 115 mins <ol style="list-style-type: none"> 10 mins 60 mins 20 mins 25 mins |

| Sessions | Contents | Objectives | Methodologies | Training Materials | Time Required |
|--|--|--|---|---|--|
| | | | system 4. Small group competition ⁵ on formulating 6 steps for Project Monitoring | | |
| 5.M&E and Database Management System (DMS) | <ul style="list-style-type: none"> • What is DMS? • Why DMS is important in Project Cycle Management • How to do it? and suggested tools | <ul style="list-style-type: none"> • To provide participants/ trainees deep understanding on Database Management System for M&E, | <ol style="list-style-type: none"> 1. Show participants/ trainees slide presentation on DMS 2. Let participants talk about their own tool for database management | <ul style="list-style-type: none"> • Slide Presentation • Handout • Laptop • LCD projector • Pointer • Flip charts • Markers • Color papers | 150 mins <ol style="list-style-type: none"> 1. 30 mins 2. 30 mins 3. 30 mins 4. 30 mins 5. 15 mins 6. 15 mins |
| 6. M&E Approach | <ul style="list-style-type: none"> • Utilizing LFA approach • Understanding about Indicators • M&E Planning & implementation or launching | <ul style="list-style-type: none"> • To provide participant understanding about M&E approach and indicators related to their current project/ program | <ol style="list-style-type: none"> 3. Show them logframe matrix and recall them that this LFA (logframe) may already existed during project formulation stage (Module 2). | <ul style="list-style-type: none"> • Slide Presentation • Handout • Laptop • LCD projector • Pointer • Flip charts • Markers • Color papers | 75 mins <ol style="list-style-type: none"> 1. 15 mins 2. 30 mins 3. 30 mins |
| 7. M&E report | <ul style="list-style-type: none"> • What is M&E report? • Why is it important to have M&E | <ul style="list-style-type: none"> • To provide participants/ trainees understanding on | <ol style="list-style-type: none"> 1. Recall session/ lessons capture from yesterday (if this become day | <ul style="list-style-type: none"> • Slide Presentation • Handout • Laptop | 120 mins <ol style="list-style-type: none"> 1. 30 mins 2. 30 mins 3. 60 mins |

⁵Imagine that there will be 25 participants/trainees, the trainer/ facilitator should divide them into 3 different groups and let them discuss on the given papers on 6 steps for project monitoring. But the trainer should not number 1,2,3,4,5,6 yet and you need to ask them to arrange and number the steps. If any group can get it done less than 10 mins (or who finish first) that group could be a winner team/group. The winner can get some small prize such as candies or one chocolate pack for their team members.

| Sessions | Contents | Objectives | Methodologies | Training Materials | Time Required |
|--|---|--|--|--|--|
| | <p>report?</p> <ul style="list-style-type: none"> • Process of Reporting and Dissemination • Characteristic of Good M&E Reporting | <p>the report format, the criteria of good M&E report and adopt some of the report template to be used in their organization</p> <ul style="list-style-type: none"> • To ask participants formulate or reflect their current M&E report | <p>two session).</p> <ol style="list-style-type: none"> 2. <u>Hot potato</u>⁶game with participants/trainees 3. Explain of good M&E reporting template | <ul style="list-style-type: none"> • LCD projector • Pointer • Flip charts • Markers • Color papers | |
| 8. Post-Test& Evaluation and wrap up session | <ul style="list-style-type: none"> • Post-test and Evaluation of the whole session | <ul style="list-style-type: none"> • To know at what level participants understand the contents of the module. • To determine the level of knowledge that participants acquire after the training. | <ol style="list-style-type: none"> 1. Conclude what had been learned 2. Trainer distributes the post-test sheet for module 4, and helps participants with any of their questions. 3. Closing ceremony | <ul style="list-style-type: none"> • Post-test and evaluation sheet • Laptop • LCD projector • Pointer • Flip charts • Markers • Dot Points | <p>60 mins</p> <p>1.20 mins</p> <p>2.20 mins</p> <p>3. 20 mins</p> |

⁶ Hot potato game is required participants/trainees standing in circle and trainers stands in the middle of circle. The ball which contains several questions is throwing to participants and those who catch the ball could take one question and need to answer. These questions and answers should reflect of what trainer/facilitator provided yesterday.

9.2. All resources and materials

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9.3. Glossary of Terminologies

Source: download by 20 Feb 2016 from IFAD website <http://www.ifad.org/evaluation/guide/annexa/a.htm>

| Term | Definition |
|---|--|
| A | |
| Accountability | Obligation of government, public services or funding agencies to demonstrate to citizens that contracted work has been conducted in compliance with agreed rules and standards or to report fairly and accurately on performance results vis-à-vis mandated roles and/or plans. This may require a careful, even legally defensible, demonstration that the work is consistent with the contract terms. Projects commonly focus on upward accountability to the funding agency, while downward accountability involves making accounts and plans transparent to the primary stakeholders. Ensuring accountability is one part of the function of monitoring and evaluation (learning and management are the other two). |
| Activity | Actions taken or work performed in a project to produce specific outputs by using inputs, such as funds, technical assistance and other types of resources. |
| Adaptive management | A process that integrates project design, management and monitoring to provide a framework for testing assumptions, adaptation and learning. |
| Annual review | See " Review ". |
| Annual work plan and budget (AWPB) | The annual commitment of the project towards the communities, the Government and IFAD, and of which implementation progress will be measured. It details the operational aspects of a project, based on the strategic plan and the situation on the ground. It is the basis for the detailed scheduling of activities and specific assignments in monthly management meetings. It is also the foundation for monitoring progress at the activity level and regarding resource use/allocation. Importantly, in the more demand-driven projects, the AWPB is also the formal (and legal) expression of the consolidated set of projects and initiatives of the primary stakeholders that will be supported over the coming year. |
| Appraisal | Assessment, in accordance with established decision criteria, of the feasibility and acceptability of a project or programme prior to a funding commitment. Criteria commonly include relevance and sustainability. An appraisal may also relate to the examination of opinions as part of the process for selecting which project to fund. |
| Appraisal report | The document that results from the appraisal mission and serves as the basis for project operational planning and annual planning. It is the overall framework (but not a blueprint) for the project strategy. |
| Approach | A specific and chosen way of advancing or proceeding. |
| Assessment | A process (which may or may not be systematic) of gathering information, analysing it, then making a judgement on the basis of the information. |
| Assumption | External factors (i.e. events, conditions or decisions) that could affect the progress or success of a project or programme. They are necessary to achieve the project objectives, but are largely or completely beyond the control of the project management. They are worded as positive conditions. Initial assumptions are those conditions perceived to be essential for the success of a project or programme. Critical (or "killer") assumptions are those conditions perceived to threaten the implementation of a project or programme. |
| Attribution | The causal link of one thing to another; e.g. the extent to which observed (or expected to be observed) changes can be linked to a specific intervention in view of the effects of other interventions or confounding factors. |
| Audit | Verification of the legality and regularity of the implementation of resources, carried out by independent auditors. An audit determines whether, and to what |

extent, the activities and organisational procedures conform to norms and criteria set out in advance. An audit helps an organisation accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control and government processes. In an internal audit the auditors report to the organisation being audited, while in an external audit the auditors report to either those who own the organisation (for example the board) or fund it.

| B | |
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| Baseline information | Information – usually consisting of facts and figures collected at the initial stages of a project – that provides a basis for measuring progress in achieving project objectives and outputs. |
| Baseline survey/study | An analysis describing the situation in a project area – including data on individual primary stakeholders – prior to a development intervention. Progress (results and accomplishments) can be assessed and comparisons made against it. It also serves as an important reference for the completion evaluation. |
| Benchmark | Reference point or standard against which performance or achievements can be compared. A benchmark might refer to what has been achieved in the past, by other comparable organisations, or what could reasonably have been achieved under the circumstances. |
| Beneficiaries | The individuals, groups or organisations who, in their own view and whether targeted or not, benefit directly or indirectly from the development intervention. In this Guide, they are referred to as the primary stakeholders of a project. |
| Budget plan schedule | Plan assigning the quarterly cost to be incurred by the different activities as well as subdividing these costs on the basis of the source of finance. |
| Budget plan summary | Summary of the budget information according to output, project component, district and facilitation units, and national and overall project level. |
| C | |
| Capacity | The ability of individuals and organisations to perform functions effectively, efficiently and in a sustainable manner. |
| Capacity -building | The processes through which capacity is created. This is an increasingly key crosscutting issue in poverty alleviation projects. |
| Causal relationship | A logical connection or cause-and-effect linkage existing in the achievement of related, interdependent results. Generally the term refers to plausible linkages, not statistically accurate relationships. |
| Causality analysis | The study of cause-and-effect relations that link an intervention to its impacts. |
| Community | A group of people living in the same locality and sharing some common characteristics. |
| Community participation | Generally considered to be the active participation of community members in local development activities. In practice, however, the term refers to a wide range of degrees of local involvement in external development interventions, from token and passive involvement to more empowerment-oriented forms of local decision-making. |
| Completion | The final phase in the project cycle, when a project completion report is produced. "Lessons learned" are identified and the various project completion activities take place. It can include an end-of-project evaluation. |
| Completion evaluation | An external evaluation that occurs after project completion. |
| Completion report | See " Project completion report ". |
| Conceptual model | A diagram of a set of relationships between factors that are believed to impact or lead to a target condition. It is the foundation of project design, management and monitoring; and it is the first part of a complete project plan. |
| Control group | A specially selected subgroup of people who purposefully do not receive the same treatment, input or training, etc. as the target group. Thus, differences between the control group and the target group can be measured and evaluated. |
| Cooperating institution | The organisation that, in a loan agreement, is responsible for the loan administration and the project supervision on behalf of IFAD. |
| Cost-benefit analysis (CBA) | The comparison of investment and operating costs with the direct benefits or |

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| | impact generated by the investment in a given intervention. It uses a variety of methods and means of expressing results. |
| Cost effectiveness | Comparison of the relative costs of achieving a given result or output by different means (employed where benefits are difficult to determine). |
| Country programme evaluation | Evaluation of one or more donors' or agencies' portfolio of development interventions in a partner country and the assistance strategy behind the interventions. |
| Country/COSOP strategy | A framework of objectives and priorities for a country drawn up and used to steer investments. |
| Critical assumption | An important factor, outside of aid itself, that influences the success of the activity, but over which the manager has no influence. Initial assumptions constitute perceived conditions for the success of a project. See "Assumptions". |
| Critical reflection | Questioning and analysing experiences, observations, theories, beliefs and/or assumptions. |

D

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| Downward accountability | The process by which development organisations are accountable to their partners and poor and marginalised groups. It entails greater participation and transparency in organisations' work. |
| Database Management System | A Database Management System (DMS) is system software for creating and managing databases for any project. |

E

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| Effect | Intended or unintended change resulting directly or indirectly from a development intervention. |
| Effectiveness | A measure of the extent to which a project attains its objectives at the goal or purpose level; i.e. the extent to which a development intervention has attained, or is expected to attain, its relevant objectives efficiently and in a sustainable way. |
| Efficacy | The extent to which the project's objectives were achieved or expected to be achieved, taking into account their relative importance. |
| Efficiency | A measure of how economically inputs (funds, expertise, time, etc.) are converted into outputs. |
| Evaluability | The extent to which an activity or project can be evaluated in a reliable and credible fashion. |
| Evaluation | A systematic (and as objective as possible) examination of a planned, ongoing or completed project. It aims to answer specific management questions and to judge the overall value of an endeavour and supply lessons learned to improve future actions, planning and decision-making. Evaluations commonly seek to determine the efficiency, effectiveness, impact, sustainability and the relevance of the project or organisation's objectives. An evaluation should provide information that is credible and useful, offering concrete lessons learned to help partners and funding agencies make decisions. |
| External evaluation | Evaluation of a project carried out by IFAD's Office of Evaluation and Studies and implementing partners. |

F

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| Facilitator | A person who helps members of a group conduct a meeting in an efficient and effective way but who does not dictate what will happen. |
| Feedback | The transmission of evaluation findings to parties for whom it is relevant and useful so as to facilitate learning. This may involve the collection and dissemination of findings, conclusions, recommendations and lessons learned from experience. Specifically in the context of evaluation, to return and share the evaluation results with those who participated in the evaluation. |
| Formative evaluation | Evaluation conducted during implementation to improve performance. It is intended for managers and direct supporters of a project. |

G

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| Goal | The higher-order programme or sector objective to which a development intervention, such as a project, is intended to contribute. Thus it is a statement of intent. |
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| Grassroots organisations | The organisations based in communities that (may) represent the primary stakeholders vis-à-vis the project and can be implementing partners. |
| H | |
| Horizontal logic | A summary of the project approach whose objective in a logframe is to define how objectives specified in the project description will be measured and the means by which the measurement will be verified. In this Guide, it is a summary of the M&E matrix |
| I | |
| Impact | The changes in the lives of rural people, as perceived by them and their partners at the time of evaluation, plus sustainability-enhancing change in their environment to which the project has contributed. Changes can be positive or negative, intended or unintended. In the logframe terminology these "perceived changes in the lives of the people" may correspond either to the purpose level or to the goal level of a project intervention. |
| Impact assessment | The process of assessing the impact of a programme in an intervention area. |
| Implementing partners | Those organisations either sub-contracted by the Project Management Unit or those organisations officially identified in the loan agreement as responsible for implementing a defined aspect of the project. Also known as "co-implementing partners". |
| Independent evaluation | See " External evaluation ". An evaluation carried out by entities and persons free of control by those responsible for the design and implementation of the development intervention. |
| Indicator | Quantitative or qualitative factor or variable that provides a simple and reliable basis for assessing achievement, change or performance. A unit of information measured over time that can help show changes in a specific condition. A given goal or objective can have multiple indicators. |
| Indirect effects | The unplanned changes brought about as a result of the intervention. |
| Information management system | A system of inputting, collating and organising data that should provide selective data and reports to the management, to assist in monitoring and controlling the project organisation, resources, activities and results. |
| Input | The financial, human and material resources necessary to produce the intended outputs of a project. |
| Intervention logic | See " Objective hierarchy ". |
| Interim evaluation | A project evaluation undertaken by IFAD's Office of Evaluation and Studies toward the end of the project implementation period (about one year before the loan closing date) when IFAD is considering a request to finance a second phase or a new project in the same area. An interim evaluation is a key opportunity for IFAD, the government, implementing partners and primary stakeholders to learn together from experience before embarking on the design of a follow-up project. |
| J | |
| Joint evaluation | An evaluation to which different institutions and/or partners contribute. |
| L | |
| Learning | Reflecting on experience to identify how a situation or future actions could be improved and then using this knowledge to make actual improvements. This can be individual or group-based. Learning involves applying lessons learned to future actions, which provides the basis for another cycle of learning. |
| Lessons learned | Knowledge generated by reflecting on experience that has the potential to improve future actions. A lesson learned summarises knowledge at a point in time, while learning is an ongoing process. |
| Loan agreement | An agreement spelling out the project's goal, area, main components and budget by expenditure category. It contains formal conditions that must be complied with, primarily relating to procurement, reporting and financial management. |
| Logical framework approach (LFA) | An analytical, presentational and management tool that involves problem analysis, stakeholder analysis, developing a hierarchy of objectives and selecting a preferred implementation strategy. It helps to identify strategic elements (inputs, outputs, purpose, goal) and their causal relationships, as well as the external |

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| Logical framework matrix | assumptions (risks) that may influence success and failure. It thus facilitates planning, execution and evaluation of a project. Also known as "logframe" or "logframe matrix". A table, usually consisting of four rows and four columns, that summarises what the project intends to do and how (necessary inputs, outputs, purpose, objectives), what the key assumptions are, and how outputs and outcomes will be monitored and evaluated. |
| M | |
| Managing for impact model | The process of guiding the overall project strategy, creating a learning environment, and ensuring effective project operations by developing and using an effective M&E system. |
| Management information system | See " Information management system ". |
| Means of verification | The expected source(s) of information that can help answer the performance question or indicators. This is found in the third column of the standard logframe. It is detailed further in the M&E Matrix |
| Mid-term evaluation | An external evaluation performed towards the middle of the period of implementation of the project, whose principal goal is to draw conclusions for reorienting the project strategy. |
| Mid-term review (MTR) | An elaborate version of a supervision mission, with the same actors, that sometimes questions the design of the project. There is no standardised format and so can range from a supervision mission to a full-scale mid-term evaluation-like exercise. |
| Monitoring | The regular collection and analysis of information to assist timely decision making, ensure accountability and provide the basis for evaluation and learning. It is a continuing function that uses methodical collection of data to provide management and the main stakeholders of an ongoing project or programme with early indications of progress and achievement of objectives. |
| Monitoring and evaluation (M&E) | The combination of monitoring and evaluation which together provide the knowledge required for: a) effective project management and b) reporting and accountability responsibilities. |
| M&E framework | An overview of the M&E system developed during the design phase of a project and included in the project appraisal report. |
| M&E matrix | A table describing the performance questions, information gathering requirements (including indicators), reflection and review events with stakeholders, and resources and activities required to implement a functional M&E system. This matrix lists how data will be collected, when, by whom and where. |
| M&E (learning) plan | An overall framework of performance and learning questions, information gathering requirements (including indicators), reflection and review events with stakeholders, and resources and activities required to implement a functional M&E system. |
| M&E (learning) system | The set of planning, information gathering and synthesis, and reflection and reporting processes, along with the necessary supporting conditions and capacities required for the M&E outputs to make a valuable contribution to project decision-making and learning. |
| M&E unit | The generic title used for units at both the project and sectoral levels responsible for M&E. |
| N | |
| Narrative summary | The first column of the logframe matrix in which the inputs, outputs, purpose and goal are formulated. See " Objective Hierarchy ". |
| O | |
| Objective | A specific statement detailing the desired accomplishments or outcomes of a project at different levels (short to long term). A good objective meets the criteria of being impact oriented, measurable, time limited, specific and practical. Objectives can be arranged in a hierarchy of two or more levels (see " Objective hierarchy "). |

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| Objective hierarchy | The different levels of objectives, from activities up to goal, as specified in the first column of the logframe. If the project is designed well, realisation of each level of objectives in the hierarchy should lead to fulfilment of the project goal. |
| Objectively verifiable indicators | A group of criteria (not necessarily measurable) used to verify the degree of accomplishment (foreseen or actual) of the sectoral purpose, the objective, and the inputs and outputs of a project. They can be quantitative, and therefore both verifiable and measurable, or qualitative, and therefore only verifiable. |
| Operational plan Outcome | See " Annual work plan and budget ". The results achieved at the level of "purpose" in the objective hierarchy. In IFAD's terminology, outcome is part of impact (result at purpose and goal level). |
| Outputs | The tangible (easily measurable, practical), immediate and intended results to be produced through sound management of the agreed inputs. Examples of outputs include goods, services or infrastructure produced by a project and meant to help realise its purpose. These may also include changes, resulting from the intervention, that are needed to achieve the outcomes at the purpose level. |
| Output indicators | Indicator at the output level of the objective hierarchy, usually the quantity and quality of outputs and the timing of their delivery. |
| P | |
| Participation | One or more processes in which an individual (or group) takes part in specific decision-making and action, and over which s/he may exercise specific controls. It is often used to refer specifically to processes in which primary stakeholders take an active part in planning and decision-making, implementation, learning and evaluation. This often has the intention of sharing control over the resources generated and responsibility for their future use. |
| Participatory evaluation | A broad term for the involvement of primary and other stakeholders in evaluation. The primary focus may be the information needs of stakeholders rather than the donor. |
| Participatory impact monitoring | A continual immediate assessment of the impact, used to control and steer purposes. It is characterised by the way actors at various levels attempt to collaborate in order to reflect on the impacts. |
| Partner | The organisation in the project country with which the funding agency collaborates to achieve mutually agreed upon objectives. Partners may include host country governments, local and international NGOs, universities, professional and business associations, private businesses, etc. |
| Performance | The degree to which a development intervention or a development partner operates according to specific criteria/standards/guidelines or achieves results in accordance with stated goals or plans. |
| Performance question | A question that helps guide the information seeking and analysis process, to help understand whether the project is performing as planned or, if not, why not. |
| Planning system | A system including the following main aspects: strategic planning, annual planning and budgeting, and monthly activity scheduling. |
| Precondition | Condition that must be fulfilled before a project can become effective (when disbursement against the loan becomes possible). |
| Primary stakeholders | The main intended beneficiaries of a project. |
| Process evaluation | An evaluation aimed at describing and understanding the internal dynamics and relationships of a project, programme or institution. |
| Process monitoring | The activities of consciously selecting processes, selectively and systematically observing them to compare them with others, and communicating about what has been observed to learn how to steer and shape the processes. |
| Project | An intervention that consists of a set of planned, interrelated activities designed to achieve defined objectives within a given budget and a specified period of time. |
| Project completion report | The report that describes the situation at the end of a development intervention, including lessons learned. The project completion report (PCR) is the responsibility of the borrower (i.e. the government). |

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| Project cycle management | A tool for understanding the tasks and management functions to be performed in the course of a project or programme's lifetime. This commonly includes the stages of identification, preparation, appraisal, implementation/supervision, evaluation, completion and lesson learning. |
| Project evaluation | Evaluation of an individually planned development intervention designed to achieve specific objectives within a given budget and time period. |
| Project impacts | The changes in a situation that arise from the combined effects of project activities, or the extent to which the goal or highest-level project objectives are achieved. Impact also refers to any unintended positive or negative changes that result from a project. Impact sometimes means anything achieved by the project beyond direct outputs. |
| Project implementation manual | A project-specific document that sets out the project strategy, operational activities, steps and procedures, and responsibilities of key stakeholders. This often includes a detailed M&E operational plan. |
| Project management | The process of leading, planning, organising, staffing and controlling activities, people and other resources in order to achieve particular objectives. |
| Project performance | The overall quality of a project in terms of its impact, value to beneficiaries, implementation effectiveness, and efficiency and sustainability. |
| Project strategy | An overall framework of what a project will achieve and how it will be implemented. |
| Proxy indicator | An appropriate indicator that is used to represent a less easily measurable one. |
| Purpose | The positive improved situation that a project or programme is accountable for achieving. |

Q

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| Qualitative | Something that is not summarised in numerical form, such as minutes from community meetings and general notes from observations. Qualitative data normally describe people's knowledge, attitudes or behaviours. |
| Quantitative | Something measured or measurable by, or concerned with, quantity and expressed in numbers or quantities. |

R

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| Reach | The beneficiaries and other stakeholders of a development intervention, whether sectors, groups of people or geographic areas of the country or region. |
| Relevance | The extent to which the objectives of a project are consistent with the target group's priorities and the recipient and donors' policies. |
| Reliability | Consistency or dependability of data and evaluation judgements, with reference to the quality of the instruments, procedures and analyses used to collect and interpret evaluation data. Information is reliable when repeated observations using the same instrument under identical conditions produce similar results. |
| Resources | Items that a project has or needs in order to operate, such as staff time, managerial time, local knowledge, money, equipment, trained personnel and socio-political opportunities. |
| Result | The measurable output, outcome or impact (intended or unintended, positive or negative) of a development intervention. |
| Review | An assessment of the performance of a project or programme, periodically or on an as-needed basis. A review is more extensive than monitoring, but less so than evaluation. |
| Risk | Possible negative external factors, i.e. events, conditions or decisions, which are expected to seriously delay or prevent the achievement of the project objectives and outputs (and which are normally largely or completely beyond the control of the project management). |

S

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| Sample | The selection of a representative part of a population in order to determine parameters or characteristics of the whole population. |
| Self- evaluation | An evaluation by those who are administering or participating in a programme or project in the field and/or by those who are entrusted with the design and delivery |

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| Situation analysis | of (part of) a development intervention. As with any evaluation, a self-evaluation focuses on overall impact and performance, or specific aspects thereof. The process of understanding the status, condition, trends and key issues affecting people, ecosystems and institutions in a given geographic context at any level (local, national, regional, international). |
| Stakeholders | An agency, organisation, group or individual who has a direct or indirect interest in the project/programme, or who affects or is affected positively or negatively by the implementation and outcome of it. In this Guide, primary stakeholders is the term used for the main intended beneficiaries of a project. |
| Stakeholder participation | Active involvement by stakeholders in the design, management and monitoring of the project. Full participation means all representatives of key stakeholder groups at the project site become involved in mutually agreed, appropriate ways. |
| Strategic planning | A broad description of the activities that would normally be carried out as part of project development, from start to finish, and the milestones that would generally be achieved along the way, such as implementation agreements, registration, etc. The plan should also explain the different aspects that need to be addressed as part of project development, and illustrate basic principles that are to be followed. The sequence of and relationship between main activities and milestones should also be described. The appraisal report should be used as a starting point for refinement of the strategic plan as well as detailed operational planning. |
| Supervision | A process in which the legally responsible organisation (cooperating institution or IFAD itself) administers the loan, periodically reviews progress towards objectives, identifies key obstacles, helps find workable solutions and makes strategic changes, as required. |
| Sustainability | The likelihood that the positive effects of a project (such as assets, skills, facilities or improved services) will persist for an extended period after the external assistance ends. |

T

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| Target | A specified objective that indicates the number, timing and location of that which is to be realised. |
| Target group | The specific group for whose benefit the project or programme is undertaken, closely related to impact and relevance. |
| Triangulation | Use of a variety of sources, methods or field team members to cross check and validate data and information to limit biases. |

V

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| Validity | The extent to which something is reliable and actually measures up to or makes a correct claim. This includes data collection strategies and instruments. |
| Validation | The process of cross-checking to ensure that the data obtained from one monitoring method are confirmed by the data obtained from a different method. |
| Vertical logic | A summary of the project that spells out the causal relationships between, on the one hand, each level of the objective hierarchy (inputs-outputs, outputs-purpose, purpose-goal) and, on the other, the critical assumptions and uncertainties that affect these linkages and lie outside the project manager's control. |

W

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| Work plan | A detailed document stating which activities are going to be carried out in a given time period, how the activities will be carried out and how the activities relate to the common objectives and vision. The work plan is designed according to the logical framework and contains a description in each cell of the work plan table of each activity and output, its verifiable indicators, the means of verification and its assumptions. |
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