دليل المتابعة والتقييم

جمعية الحياة والأمل

MONITORING & EVALUATION SYSTEM

إعداد

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1 INTRODUCTION

Monitoring & Evaluating is a process of non-stop information gathering and relevant analysis, in order to find out whether progress is being made in line to the pre-specified goal and objectives also highlighting any unintended (positive or negative) effects for certain project and its activities.

Monitoring is continuous collection of data on specified indicators to support and assist decision making to verify whether (project, program or policy) is being implemented in line with design model like schedules and budget as instance where as evaluation is the periodic and systematic collection of data to support the design implementation and relevant impact in the terms of effectiveness, efficiency, proper dissemination and viability of outcomes and impact.

1.1 THE OVERALL OBJECTIVE OF THE SYSTEM

These guidelines are intended to provide Life and Hope Association LHA a general overview of the Reporting, Monitoring and Evaluation System RMES. The Guidelines cover four basic areas a) Reporting System, b) Meeting System, c) operations monitoring system, and d) evaluation system. Due to the necessity of work and the intensive involvement of the current administrative levels in the current structure of LHA, there would be flexibility in the role played by some of the staff. The flexibility is that some of the staff would play multiple roles in the proposed position according to this system. This flexibility is temporarily until LHA structure has been reformed to meet the requirements of the strategic plan and this RMES. Also the guidelines will depict the standards that the potential LHA MIS will integrate with other M&E components.

1.2 IMPORTANCE OF THE SYSTEM

RMES is intended to be carried out in order to track progress and performance of all LHA programs and support the decision-making at various levels in the process of an initiative or project.

RMES should provide LHA managerial levels and other relevant stakeholders with regular information on progress relative to intentions and this enable LHA various management levels and stakeholders:

- Accountability: demonstrating to donors, beneficiaries and other partners that expenditure, actions and results are as agreed or can reasonably be expected.
- Operational management: provision of the information needed to co-ordinate human, financial and physical resources committed to the project or program.
- Strategic management: provision of information to inform setting and adjustment of objectives and strategies.
- Capacity building: building the capacity, self-reliance and confidence of beneficiaries and implementing staff and other relevant partners to effectively initiate and implement development initiatives.
- Organization learning and adaptive management.
- Key benefits at a program level, which include improving the design through feedback, provided from baselines, mid-term, terminal and ex-post evaluation in addition it will provide the evidence basis for building consensus between stakeholders.
- Key benefits at the project level by providing regular feedback on project performance as well as showing any need for correction, identifying problems early and propose solutions, monitoring access to project services and outcomes by the target population, evaluating achievement of project objectives and finally incorporating stakeholders views and promoting participation, ownership and relevant accountability.

1.3 MIS INTEGRATION WITH M&E SYSTEM

The relevant data base should track Key Performance Indicators (KPIs) and output/outcome indicators to monitor the physical progress of running projects toward certain specified targets, milestones and goals.

The database system shall enable all running LHA activities related to projects and programs by simply measure a wide array of indicators, including LHA Goals. Furthermore, LHA M&E MIS shall support the concept of Managing for Development Results (MfDR) agenda by empowering all LHA managerial levels to track development efforts forwards clear goals and results.

1.3.1 KEY FEATURES AND CAPABILITIES OF LHA M&E MIS

- For each project, pre-defined KPIs shall take place in order to measure development results (quantitative and qualitative outputs and outcomes).
- The formulation of KPIs should be based on particular needs and priorities for a certain program in order to properly set up proper baselines and proper goals, as well as to monitor progress toward achieving such goals.
- Track all KPIs associated with risks, efficiency, viability and sustainability by provide proper recording and monitoring tool in order to encourage timely corrective action and identify tangible lessons learned which should lead to ensure effective project/program implementation.
- KPIs manipulation should be flexible enough to be linked to multi segment like sector, admin unit or any other relevant criteria that assigned by senior managerial level within LHA.
- The system shall enable LHA users to analyze results by any associated category or segment sector, unit, project and/or program.
- The system shall be able to be linked with other third party statistical tool or packages such as SAS, SPSS and STATA ib order to enable LHA management to utilize statistical correlations between related financial/output/outcome indicators and national socioeconomic indicators.
- The system shall integrate all relevant data by enabling applicable users to enter all projects data and submit project progress reports on a regular basis directly throughout the internet. In case internet access is limited an offline version of the system is being implicitly enacted.

- The system shall enable updating progress online, by enabling various applicable users to create ad-hoc sophisticated and user friendly reports and charts in order to support informed decision-making. The analytical modules (report builder and chart) shall be integrated into the main database system providing a consistent user-interface.
- The system shall enable applicable users to conduct the relevant queries of data and any combination of variables like (admin uint,region,partner, project,etc).

1.4 METHODOLOGY AND APPROACH

To achieve the planned objectives of the report, the Consultant carried out the following activities during the assessment phase:

a. Conduct inception workshop:

The Consultant conducted a preparatory workshop in the presence of the LHA stakeholders before the commencement of the study. They discussed the study approach and general methodology. The workshop intended to:

- Increase the awareness of all relevant stakeholders about the E&M guidelines.
- Agree upon the roles of all concerned parties in the study,
- Determine the scope of work,
- Reach a consensus on how to use the guidelines in efficient way,
- Identify the key contact person(s)
- Parties invited are;
    - Board of Directors
    - Senior Staff
    - IT Consultant

b. Desk Review:

The consultant reviewed the related materials such as:

- Previous studies toward the last strategic plan, activities, work-plan and any previous evaluation activities or/and assessments, minutes of board meetings, and related reports.
- The System Requirements Specifications (SRS)

c. Review the current Administrative and Legal Framework Policies and procedures

The consultant reviewed the current administration and legal framework, policies and procedures of the PPA with emphasis on:

- Organizational Diagram
- The roles and responsibilities of the various LHA units and key staff in term of accountability of the decision making

d. Semi structured interviews (Key Informant Interviews):

The consultant held several interviews with the LHA Board of Directors, IT consultant and senior staff to generate overall insight on PPA from the strategic level.

e. Focus Groups with staff:

The consultant held a number of focus groups with the staff to get specific information about the effectiveness and efficiency of operations and functions performed in the different aspects of the organization (accountability of the decision making).

This activity aims at identifying the main obstacles and challenges that are facing the implementation of their activities. During the focus group meeting, the consultant used organizational capacity assessment tool to assess the capacity of the LHA from the staff perspective point of view.

2 REPORTING SYSTEM

2.1 REPORTING FROM THE CORDINATOR TO THE PROJECT MANGER.

The progress report prepared by the Coordinators provides the basis for the Project Manager reporting on projects to the Program Manger. The coordinator progress report covers a period of two weeks. The coordinator progress report is based on the implementers' progress reports. The first reporting period starts from the commitment date. The Project manager should receive the progress reports from the Coordinators no later than the end of the first and third weeks of each calendar month and covering the activities of the elapsed period.

A model for the progress report is provided in Annex I. The report must compare the actual implementation with the planned implementation and the actual outputs (intermediate outcomes) with the planned outputs in accordance with the indicators at the Outputs level. As for any deviations between the planned progress and the actual progress towards outputs, the report must describe the deviations' possible repercussions on the outputs, analyze the reasons for the deviations and propose an action plan how to deal with the deviations.

The coordinator progress report must include information on Output # & Name, Activities overall achievement, Intermediate Outcomes/results, Actual Input (time & Cost), Deviation from planned input and/or outputs, Recommended Adjustments on input and/or outputs, identifying the progress towards targets for indicators for outputs and result. The report must also address the output implementation context.

2.2 REPORTING FROM THE PROJECT MANAGER TO THE PROGRAM MANAGER

The progress reports prepared by the project officers provide the basis for the Program Manager reporting on program to the Board of Directors BOD. The Project Manager's progress report covers a period of one month. The Project Manager Progress report is based on the coordinators' progress reports. The first reporting period starts from the commitment date. The Program Manager should receive the progress reports from the

Projects Manager no later than the end of the first week of each calendar month and covering the activities of the elapsed period.

A model for the progress report is provided in Annex I. The report must compare the actual achieved objectives with the planned objectives in accordance with the indicators at the objectives level. As for any deviations between the planned progress and the actual progress towards objectives, the report must describe the deviations' possible repercussions on the goal, analyze the reasons for the deviations and propose an action plan how to deal with the deviations.

The Project Manager progress report must include information on Objective # & Name, Overall Outputs Achievement, Objectives achievement, Accumulated Actual input(time & $), Efficiency, Deviation from planned Objectives, Recommended Adjustments on objectives, identifying the progress towards targets for Goals. The report must also address the Objective implementation context.

2.3 REPORTING BY THE PROGRAM MANAGER TO THE BOARD OF DIRECTORS AND DONORS.

2.3.1 MANAGEMENT STATUS REPORT (QUARTERLY)

The report prepared by each Program Manager (PM) will serve as a basis for the management status report to the Board of Directors and Narrative Reports to the Donors and edited reports to stakeholders. A model for the Management Status report is provided in Annex I. The Management Status report should cover a period of three calendar months. The Financial Performance section comprises summary eligible expenses for activities, for individual projects, programs and block grants respectively.

The Management Status report must include information on financial and physical progress. The report financial performance section must include Goal Name #, Budget, Donations Received (Source and Value), Expenditure, Expenditure–Budget Deviation, Justifications, and Recommendations for Modification

The project progress section of the report is verified by the PM. The PM forwards the report to the Board of Directors.

The PM's progress report must include information on Goal # and Name, Over All Objective Achievement, Goals achievement, Goal Actual input(time & $), Goal Efficiency, Deviation from planned Goals, Recommended Adjustments on Goals, Short Term Impact, identifying the progress towards targets for Mission. The report must also address the Goal implementation' context.

2.3.2 NARRATIVE PROGRESS REPORT (SEMI-ANNUAL AND ANNUAL)

The Narrative reports prepared by PM will serve as a basis for the Donors' disbursement requests of the organization. A model for the project interim report is provided in Annex I. The project Narrative should cover a period of six calendar months. The payment claim section comprises summary eligible expenses for activities for individual projects, programs and block grants respectively.

As for project progress, the Narrative must include information on financial and physical progress. The report must compare actual expenses with planned expenses and the actual progress with planned progress in accordance with the project implementation plan.

Any deviations from the original implementation plan must be described and duly justified. The interim report must include information on the progress towards quantified targets for Results indicators of the project. In addition, the report must include confirmation on the co-financing.

The Narrative must include information on Background, General reporting on outcomes, Problems and adjustments, Provision of services, Advocacy, Sustainability, Information activities, Risk / Opportunity Assessment, and Lessons Learned.

The semiannual / Annual Narrative and the financial reports are verified by the PM. The PM forwards the reports to the Donors, which verifies the payment claim section and releases the following funding disbursement. The semi-annual reports must be submitted to the donor focal point maximum Six weeks from the end of the lapsed period.

2.4 PROJECT COMPLETION REPORT

The PM shall provide the Donors with a project completion report. The final disbursement is made based on the project completion report and the final project interim report. Accordingly, the project completion report and the final project interim report by the LHA should serve as a basis for the PM project completion report to the Donors.

In order for the PM to be able to provide the Donors with a project completion report, the PM should require information from the Project Manager according to the suggested project completion report structure in Annex I.

The project completion report must document that the project has been completed according to the specific criteria on the basis of which it was approved for grant assistance, as set out in the grant offer letter and in the grant agreement (including the project implementation plan annexed to the grant agreement). In the project completion report, the Organization determines the final expenses for the completed project. The completion report shall document and comment on overall achievement against the original plan, including the achievement of the targets set for indicators on results, purpose and overall objective, on the cross-cutting issues, prospects for the sustainability of benefits, highlight lessons learned and make recommendations on any follow-up actions that might be needed.

2.5 PROJECT NARRATIVE EDITED REPORT

The PM shall provide the stakeholders mainly stakeholder organizations, beneficiaries, public and media with edited reports. These reports should take the form of a narrative (storyline) of work completed and results achieved to date. These narrative reports should be understandable by those having no previous knowledge of the subject area or the project; suitable contextual information on the project and its objectives. Edited reports should not contain any confidential or commercially sensitive information. The suggested edited reports structure is shown in Annex I.

3 MEETINGS SYSTEM

The regular meetings mechanism is the second component of the Monitoring system. The meeting mechanism has been divided according to administrative level; and the frequency of each meeting has been identified based on the work requirement. It is worth mentioning at this point that: a) all types of the minutes of meetings should not exceed 3 pages to assure efficiency, b) the meeting dates should not modified except if they happen to come during official holidays, c) attendance of the meeting is obligatory for all parties involved as identified, d) for the meetings to achieve their instructive purposes each administrative level has to maintain an up to date running file the meetings durations must not be exceeded under any condition.

3.1 BI WEEKLY MEETING BETWEEN ACTIVITY WORKERS AND COORDINATOR

The regular Biweekly meeting takes place in the first working day of the First and third weeks of every month. The meeting duration must not exceed one hour. The meeting is based on the activity implementer weekly progress reports, and aimed at the discussion of Lessons learned/Remarks of the elapsed period. The focus of the meeting would be on the causes and impact of deviations from the preset activities' plan, the methods to remedy and future prevention from the deviation, and the coming period targeted activities. The form of the meeting minutes are presented in Annex II.

3.2 MONTHLY MEETING BETWEEN COORDINATOR AND PROJECT MANAGER

The regular monthly meeting takes place in the first working day of the second week of every month. The meeting duration must not exceed one hour. The Coordinators should forward to the Project Manager Summaries of the main points of the bi-weekly meetings two working days prior to the monthly meeting. The meeting is based on the Coordinator progress reports and the Bi weekly meeting of the staff, and is aimed at the discussion of Lessons learned/Remarks of the elapsed period at output level. The focus of the meeting would be on the causes and impact of deviations from the identified outputs, the methods to remedy and future prevention from the deviation, and the coming period targeted outputs. The form of the meeting minutes are presented in Annex II.

3.3 BI-MONTHLY MEETING BETWEEN PROJECT MANAGER AND STAFF

The regular bi-monthly meeting takes place in the Last working day of every other month. The meeting duration must not exceed one hour. The meeting is: a) based on the Coordinator progress reports, the Bi weekly meeting with the staff, and the monthly meeting with the coordinators, b) aimed at the assessing the outputs visualization of the elapsed period, and c) dissemination of information on any developments within the organization, modification in outputs, and new projects. The focus of the meeting would be on new identified community needs/competition and the coming period targeted outputs. The form of the meeting minutes are presented in Annex II.

3.4 BI-MONTHLY MEETING BETWEEN PROJECT MANAGER AND PROGRAM MANAGER

The regular Bi-monthly meeting takes place in the Last working day of the first week every other month. The meeting duration must not exceed Two hours. The Project Manager should forward to the Program Manager summaries of the main points of the pre-mentioned monthly and bi-monthly meetings two working days prior to the meeting. The meeting is: a) based on the project coordinator's progress reports, the Bi-monthly meeting with the staff, and the monthly meeting with the coordinators, b) aimed at the assessing the objectives visualization of the elapsed period, and c) dissemination of information on any developments within the program, modification in Objectives/outputs/inputs, and new projects. The focus of the meeting would be on new identified opportunities/threats and the coming period targeted objectives. The form of the meeting minutes are presented in Annex II.

3.5 QUARTERLY MEETING BETWEEN PROGRAM MANAGER, FUNDRAISING OFFICER AND FINANCIAL OFFICER.

The regular quarterly meeting takes place in the first working week of every quarter and covering the elapsed quarter. The meeting duration must not exceed three hours. The Financial Officer and Fundraising Officers should forward to the Executive Manager summaries of the main points of the bi-monthly meetings with project officers three working days prior to the meeting. The meeting is: a) based on the Program Officer progress reports and the Bi-monthly meeting with the project officer, b) aimed at the assessing the Goal visualization of the elapsed period, c) the assessing of the short term impact, and d) dissemination of information on any developments within the program, modification in Strategic Plan and Budget, and new projects. The focus of the meeting would be on the organization SWOT analysis, risk assessment and the coming period targets. The form of the meeting minutes are presented in Annex II.

3.6 QUARTERLY MEETING BETWEEN THE PROGRAM MANAGER AND BOARD OF DIRECTORS

The regular quarterly meeting takes place in second half of February, May, August and November and covering the elapsed quarter. The meeting duration must not exceed four hours. The Program Manager should forward to the Board summaries of the main points of the Quarterly meetings with the Program Officers, Finance Officer and Fundraising Officer, and the meetings/communications with the donors five working days prior to the meeting. The meeting is: a) based on the Executive Manager Status reports and the meetings/ communications summaries, b) aimed at the assessing the Strategic Plan/Mission visualization of the elapsed period, and c) assessment of the organization over all operational and financial performance, and d) assessment of long term impact and sustainability of the organization and Strategic plan. The focus of the meeting would be on modification/development in the Organization Strategies/Mission/Vision (if any). The form of the meeting minutes are presented in Annex II.

3.7 SEMI-ANNUAL MEETING BETWEEN BOARD OF DIRECTORS, PROGRAM MANAGER, PROJECT MANAGER, COORDINATOR AND OPERATIONAL STAFF OF LHA

The regular Semi-Annual meeting takes place every six months and covering the elapsed period. The meeting duration must not exceed four hours. The Executive Manager should forward to LHA staff summaries of the main points of the Quarterly meetings with the Finance officer, Program Officers and Fundraising Officer five working days prior to the meeting. The meeting is: a) based on the Executive Manager Status reports and the Quarterly meetings with Program Officers, b) aimed at the assessing the Strategic Plan/Mission visualization of the elapsed period, c) assessment of long term impact, and d) dissemination information on any developments due to Board meetings, modification in the Organization Mission and Vision (if any), and new directives. The focus of the meeting would be on the Organization SWOT analysis and the Risk Assessment.

4 OPERATION MONITORING SYSTEM

In order for the Operations Monitoring system to achieve its aim, the consultant is suggesting the following tool to be applied in the LHA .

Toolkit	**Explanation**
Materials Review	Review of LHA materials (documents).
Focus Groups	Focus groups are dynamic discussion groups between 8-12 people that are judgmentally selected as representatives of a larger(non) group of population., for example members of the community, management staff, experts, beneficiaries, etc. A facilitator will be used to direct the group discussion and to focus attention on the specific aims of the session (which may involve developing practical recommendations). The evidence produced through focus groups is qualitative in nature and has the major advantage that it gives depth and understanding to a given topic. A typical focus group session can last from 90 to 180 minutes. Evidence obtained from focus groups alone will be used in combination/ collaboration with other evidences. Steps to using this technique are: • Selecting a facilitator • Determining the number of focus groups • Deciding the participants of the focus groups • A topic guide: The facilitator needs to prepare a detailed agenda of issues, which the focus group is expected to discuss. This acts as a guide for the discussion. • Conducting the focus group: The facilitator needs to keep the discussions in the focus group relevant to the issue/ objective of the discussion. • Recording the results of a focus group or minutes of the meeting could be taken. • Analysing the results of a focus group.
Interviews	Question-answer sessions to elicit specific information about evaluation items. Interviews will be structured or individual (semi-structured). a) Structured interviews (Mini- survey questionnaire) will aim to gather

	the same information from many people (60-75 persons). - Questions will have specific wording and will be asked in a set order. - Data will be quantified. b) Semi-structured interviews are conducted with a fairly open framework which allow for focused, conversational, two-way communication. They can be used both to give and receive information and start with more general questions or topics. Not all questions are designed and phrased ahead of time. The majority of questions are created during the interview, allowing both the interviewer and the person being interviewed the flexibility to probe for details or discuss issues. Steps to using this technique are: ▪ Preparing the questions ▪ Determining the interviewees ▪ Conducting and recording the results ▪ Analyzing the results Triangulation of questions will try to avoid problems of confirming what is said, so as to confirm their value as evidence. Interviews generally will be corroborated through information from other independent sources such as documents, observations or structured interviews.
Participatory Observation	Participatory observation is a way of looking at the situation or behavior of people so as to compare it with what people report. It will be a useful means of obtaining a better picture of the situation, particularly of aspects that are difficult for participants to verbalize and will uncover structural problems in activities, projects and programs. Stages in Participatory Observation are: ▪ Selection of a program or a place and definition of problems, concepts, and indicators. ▪ The evaluator chooses a strategy to move into the community setting. ▪ Selecting people and events to observe. ▪ Develop relationships with the participants. ▪ Analyzing observations. ▪ Final analysis and interpretation.

Case Studies	Expected results: the examination of a selection of LHA projects and activities in order to understand or examine the general program or activity of LHA Case studies will be used in -the planning and execution stages of performance audit. -to highlight good practices. -comparison of cases that have performed well with those of average performance can help to identify the good practice. -to show why an activity does not provide value for money and to demonstrate the impact of a specific action or event. Steps to using this technique ▪ Deciding the projects to be studied (reasons: success, failures, representative ness…) ▪ Selecting areas to be studied ▪ Cases to be studied will not be selected statistically but judgmentally ▪ Conducting the case study ▪ Analyzing the results The results from the cases will be more accurate as greater in-depth investigation will be possible. This case study will make it easier to determine problems, their cause and effect, alongside good practices and can thus produce pragmatic recommendations. These cases studies will involve judgment in selection and could be subjected to bias so they will be selected in a participatory way once the evaluation begin.
Lessons learned meeting	Diary feedback and iterative feedback process

The effective monitoring system established should; a) allow the Program Manager to monitor the progress of Programs, projects, and activities; b) provide over sight for the Financial Manager for making the disbursement requests to the programs, c) provide the basis for Executive Manager reporting to the Board of Directors and Donors both on project and on the Strategic Plan level as well as facilitate the monitoring of all previous levels. It is important that the reporting is done in accordance with the guidelines given by the Donors.

5 EVALUATION SYSTEM

Evaluation of LHA programs and activities focuses on:

- Sustainability: The extent to which the positive effects of the programs continue after the external assistance has come to an end.
- Relevance: The degree to which the programs are justified in relation to the needs of the beneficiaries and the policy environment of the programs.
- Impact: The intended and unintended impacts of the programs.
- Effectiveness: The extent to which the programs objectives have been achieved
- Efficiency: The cost-effectiveness of transforming inputs into outputs

Evaluation incorporates usually external experts for the purpose of objectivity. It is undertaken at mid term, completion and ex-post of the program. The structure of evaluation report is presented in Annex I.

6 ANNEX I FORMS OF REPORTS

مجموعة نماذج للتقارير الدورية المقترحة لكافة مستويات الإدارة في مؤسسة الحياة والأمل وتستجيب لمجموعة المعايير والتوصيات الخاصة بتطبيق نظام المتابعة والتقييم المقترح.

<u>نموذج تقرير (أسبوعي) من موظف تطبيق النشاط إلى منسق المشروع</u>

التاريخ : - - / - - / - - - -   المدة : - - - - - / - - -

رمز النشاط واسمه	وصف المدخلات	وصف المخرجات	الانحراف عن الخطة	التوصيات فيما يتعلق بتعديل الخطة

التوقيع : - - - - - - - - - - - -

نموذج تقرير (أسبوعي) من منسق المشروع إلى مدير المشروع

التاريخ : - - / - - / - - - -   المدة : - - - - - - / - - -

رمز المخرج واسمه	النشاطات المنجزة	وصف المخرجات والنتائح	المدخلات الحقيقية (وقت وتكلفة)	الانحرافات عن الخطة	التوصيات على تعديل المدخرت والمخرحات

التوقيع : - - - - - - - - - - - - -

نموذج تقرير (شهرى) من مدير المشروع إلى مدير البرنامج

التاريخ : - - / - - / - - - -

المدة : - - - - - - / - - -

رمز الهدف واسمه	المخرجات التي تم انجازها	الأهداف التي تم انجازها	المدخلات التراكمية (وقت وتكلفة)	الكفاءة	الانحرافات عن الأهداف المخططة	التوصيات عل تعديل الأهداف

ملاحظات ذات علاقة :

التوقيع : - - - - - - - - - - -

نموذج تقرير من مدير البرنامج إلى مجلس الإدارة

تقرير إداري كل 3 أشهر

التاريخ : - - / - - / - - - - **المدة : - - - - - / - - -**

القسم المالي :

رمز الهدف واسمه	الموازنة	الهبات المستلمة (مبالغ وأسماء المانحين)	المصاريف	المصاريف التي تجاوزت الموازنة	الأسباب	التوصيات

i. القسم العملياتي :

الأهداف التي تم تحقيقها	المدخلات (وقت وتكلفة) الخطة الإستراتيجية	مدى كفاءة وفعالية الهدف	الانحراف عن الخطة الإستراتيجية	التوصيات نحو تعديل الخطة الإستراتيجية	الآثار المترتبة على المدى الطويل	الاستدامة

نموذج تقرير التقييم العام

لابد لتقرير تقييم المشروع العام أن يحتوى التالي :

- **رسالة** Cover Page
- **فهرس المحتويات**
- ملخص ويفضل أن يكون في وثيقة منفصلة ويشمل الاستنتاجات الرئيسية لعملية التقييم وكذا توصيات تتوافق مع أهداف التقييم التي يفترض أن تكون وضعت مسبقا .
- مجموعة أسئلة التقييم الرئيسية وكذا المشتقة منها .
- توضيح واثبات للخطوات والتقنيات المستخدمة بما يشمل الافتراضات والقيم والنظريات التي تم إتباعها وكذا تفسير واضح لعملية اختيار الأشخاص والمشاريع التي تم إجراء عملية التقييم عليها.
- المحددات إلى واجهت عملية التقييم (موارد بشرية – مادية ... الخ).
- عرض لنتائج عملية التقييم بشكل محدد وواضح ويفضل عرض أسئلة التقييم وإجاباتها كما هي.
- الاستنتاجات العامة لعملية التقييم ولابد أن تكون متناسقة مع أسئلة التقييم .
- التوصيات الرئيسية ويجب أن تكون مرتبطة ومترابطة مع الاستنتاجات ويجب أن تكون التوصيات عملية ويفضل أن يتم توزيعا على جميع الجهات relevant stakeholders ذات العلاقة

7 ANNEX II FORMS OF METTING

ملحق خاص بنماذج مقترحة لمحاضر الاجتماعات لكافة مستويات الإدارة في مؤسسة الحياة والأمل وتستجيب للمعايير والتوصيات الخاصة بتطبيق نظام المتابعة والتقييم المقترح.

محضر اجتماع (أسبوعي) بين منفذ النشاط ومنسق المشروع

التاريخ ________________ **المدة :** ______/____________

الحضور :

الاسم	التوقيع	الاسم	التوقيع

جدول ا لاجتماع

1. الدروس المستفادة / ملاحظات من الفترة السابقة (10 دقائق).
2. أسباب انحراف أية نشاطات عما هو مخطط والآثار المترتبة عليها (10 دقائق).
3. الإجراءات الواجب إتباعها في المستقبل لتجنب انحراف الأنشطة عما هو مخطط لها (30 دقيقة).
4. مراجعة الأنشطة المستقبلية.

محاور النقاش :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

القرارات وتحديد المسئوليات :

1. ____
2. ____
3. ____
4. ____
5. ____

تاريخ الاجتماع القادم : ______________

محضر اجتماع (شهرى) بين منسق المشروع ومدير المشروع

التاريخ _______________ **المدة** : ______/ ___________

الحضور :

الاسم	التوقيع	الاسم	التوقيع

جدول ا لاجتماع

1. الدروس المستفادة / ملاحظات من الفترة السابقة (10 دقائق).
2. أسباب انحراف أية نشاطات عما هو مخطط والآثار المترتبة عليها (10 دقائق).
3. الإجراءات الواجب إتباعها في المستقبل لتجنب انحراف الأنشطة عما هو مخطط لها (30 دقيقة).
4. مراجعة الأنشطة المستقبلية.

محاور النقاش :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

القرارات وتحديد المسئوليات :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____

تاريخ الاجتماع القادم : ____________

محضر اجتماع (شهري) بين مدير المشروع وفريق العمل

التاريخ ________________ المدة : ______/ ____________

الحضور :

الاسم	التوقيع	الاسم	التوقيع

جدول ا لاجتماع

1. الدروس المستفادة / ملاحظات من الفترة السابقة (10 دقائق).
2. أسباب انحراف أية نشاطات عما هو مخطط والآثار المترتبة عليها (10 دقائق).
3. الإجراءات الواجب إتباعها في المستقبل لتجنب انحراف الأنشطة عما هو مخطط لها (30 دقيقة).
4. مراجعة الأنشطة المستقبلية.

محاور النقاش :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

القرارات وتحديد المسئوليات :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____

تاريخ الاجتماع القادم : _____________

محضر اجتماع (ربعى) بين مدير المشروع ومدير البرنامج

التاريخ ________________ **المدة :** ______/ ____________

الحضور :

الاسم	التوقيع	الاسم	التوقيع

جدول ا لاجتماع

1. الدروس المستفادة / ملاحظات من الفترة السابقة (10 دقائق).
2. أسباب انحراف أية نشاطات عما هو مخطط والآثار المترتبة عليها (10 دقائق).
3. الإجراءات الواجب إتباعها في المستقبل لتجنب انحراف الأنشطة عما هو مخطط لها (30 دقيقة).
4. مراجعة الأنشطة المستقبلية.

محاور النقاش :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

القرارات وتحديد المسئوليات :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____

تاريخ الاجتماع القادم : ____________

محضر اجتماع (ربعى) بين مدير البرنامج ومجلس الإدارة

التاريخ ________________   **المدة :** ______/ ____________

الحضور :

الاسم	التوقيع	الاسم	التوقيع

جدول ا لاجتماع

1. الدروس المستفادة / ملاحظات من الفترة السابقة (10 دقائق).
2. أسباب انحراف أية نشاطات عما هو مخطط والآثار المترتبة عليها (10 دقائق).
3. الإجراءات الواجب إتباعها في المستقبل لتجنب انحراف الأنشطة عما هو مخطط لها (30 دقيقة).
4. مراجعة الأنشطة المستقبلية.

محاور النقاش :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

القرارات وتحديد المسئوليات :

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____

تاريخ الاجتماع القادم : ______________

نموذج عام لمحضر (اجتماع \ مكالمة)

اسم الموظف : مسئول عن تنفيذ النشاط والمحصلة الآنية

1. الهدف الإستراتيجي : ----------------------
2. الهدف المحدد : ----------------------
3. المخرجات : ----------------------
4. النشاط : ----------------------

التاريخ: -------------- مكان النشاط: ---------------- المدة: -----------------

الشخص	الجهة	الشخص	الجهة

أجندة \ أهداف الاجتماع:

1. --
2. --
3. --
4. --

محاور النقاش:

1. --
2. --
3. --
4. --

ما تم الاتفاق عليه و توزيع المسؤوليات:

1. --
2. --
3. --
4. --

موعد المتابعة \ اللقاء التالي:

8 ANNEX III : REPORTING (ENGLISH TEMPLATE)

R01 Reporting Form from Activity Implementer to Coordinator # (Weekly)

Date --/--/----   Duration ----------/--------

Activity # & Name	Actual Inputs description	Immediate outcomes	Deviation from plans	Recommended Adjustments on planned activities

Signature -------------------------

R02 Reporting Form from Coordinator to Project Manager (Bi-weekly)

Date --/--/---- Duration ----------/--------

Output # & Name	Activities overall achievement	Intermediate Outcomes/results	Actual Input (time & $)	Deviation from planned input and/or outputs	Recommended Adjustments on input and/or outputs

Signature -------------------------

R03 Reporting form from Project Manager to Program Manager (Monthly)

Date --/--/----   Duration ----------/--------

Objective # & Name	Overall Outputs Achievement	Objectives achievement	Accumulated Actual input(time & $)	Efficiency	Deviation from planned Objectives	Recommended Adjustments on objectives

<u>**Comments on cross cutting issues**</u>

Signature ------------------------

R04 Reporting form From Program Manager to Board of Directors-Management Status Report (3 months)

Date --/--/----   Duration ----------/--------

Financial Section

Goal Name #	Budget	Donations Received (Source and Value)	Expenditure	Expenditure – Budget Deviation	Justifications	Recommendation for Modification

Operational Section

Over All Goals Achievement	Strategic Plan Actual input(time & $)	Goal Efficiency	Deviation from Strategic Plan	Recommended Adjustments on Strategic Plan	Long Term Impact	Sustainability

Signature ------------------------

R05 Narrative Progress Report Structure

A: Background

A1. Introduction

A.2 Project Implementation in Context

B: General reporting on outcomes

B.1 Summary (Write a brief summary (assessment) of the project's most important outcomes, problems and lessons learnt.)

B.2 Outcomes (List the main, immediate outcomes of the project (in a bulleted list, and with reference to indicators)

B.3 Who has benefited from the project (target group)? Specify by gender

B.4 Give an assessment of the extent to which the project has achieved its objectives (in what ways has it succeeded/failed).

C: Problems and adjustments

C.1 What problems has the project had to address

C.2 What adjustments to the project design have been implemented (bulleted list and explanations)?

D: Provision of services

D.1 what was the extent of the project’s capacity in terms of the total size of the area (people in the same situation)?

D.2 what were the total annual costs per person/household in receipt of these services?

E: Advocacy

E.1 How has the project helped to place new issues on the agenda?

E.2 To what extent did these initiatives produce appreciable outcomes (e.g. improved circumstances for certain groups, changed practices on the part of public authorities or legislative amendments)?

F: Sustainability

F.1 In what ways has experience derived from the project been documented, and

F.2 what has been done to transfer this experience to other organizations and institutions?

G: Information activities:

G.1 List any information activities undertaken in connection with the project.

G.2 To what extent was the aim of these activities achieved?

G.3 Specify to what extent these activities were innovative.

G.4 Specify means of communication

H: Risk / Opportunity Assessment

I: Lessons Learned

R06 Project Completion Report

A: Background

A1. Introduction

A.2 Summary of the socio-political-economic environment development during Strategic Plan Implementation

B: General reporting on outcomes

B.1 Summary (Write a brief summary of the Goals/mission/vision Visualization, most prominent problems and overall lessons learnt.)

B.2 Document (in a bulleted list) that the strategic Plan has been completed according to the specific criteria on the basis of which it was approved for grant assistance, as set out in the Bilateral grant agreements and JFA (including the project implementation plan annexed to the grant agreement)

B.2 Give an assessment of the extent to which the strategic plan has achieved its aims and goals (in what ways has it succeeded/failed).

C: Problems and adjustments

C.1 What were the most prominent problems?

C.2 What adjustments to the project design have been implemented (bulleted list and explanations)?

D: Provision of services

D.1 To what extent did the strategic plan succeeded/failed in bridging the gab between community needs and level of service provision.

D.2 What was done to ensure that the Strategic Plan did not give rise to imbalances between those who have benefited directly from the project and those not reached by the project?

E: Advocacy

E.1 How has the Strategic Plan helped to develop the community agenda?

E.2 To what extent did these initiatives produce appreciable impacts?

F: Sustainability

F1. In what ways will the results achieved by the Strategic Plan be sustained in the long term (sustainability)?

F.2 what has been the impact of the experience/knowledge transfer on targeted organizations and institutions?

G. Organization Current SWOT analysis

H. Lessons Learned

I. Recommendations on any follow-up actions that might be needed.

R07 Project Narrative Edited Report

Questions addressed in an edited report (intermediate or final) include the following:

- Why was the project needed? (Requirements)

- What did the project set out to achieve? (Objectives)

- What was intended to be done and what has actually been done? (Work carried out)

-Have there been links between this project and other relevant projects? (Concentration)

-What came out of the project so far? (Results)

- How will (or may) the results be used (within or outside the project)? (Exploitation)

- How have (or will) the results be disseminated? (Dissemination)

Each edited report must contain

- an executive summary

- appendices, e.g. to present more detailed technical information, press releases or other material suitable for the media, partner contacts

- references to sources of particular technical or scientific documentation and of equipment (hardware, software).

R07 Evaluation Report

The evaluation report should include the following components:

- Cover page
- Table of contents
- An executive summary acting as a separate document and including major findings of the evaluation and summarize conclusions and recommendations The objectives of the evaluation
- The main evaluative questions and derived sub-questions.
- A justification of the methods and techniques used (including relevant underlying values and assumptions, theories) with a justification of the selections made (of persons interviewed, projects visited).
- Eventual limitations of the evaluation.
- A presentation of the findings and the analysis thereof (including unexpected, relevant findings). All evaluation questions should be addressed, paying attention to gender issues
- Conclusions, which will analyze the various evaluation questions. Conclusions have to be derived from findings and analysis thereof.
- Recommendations should be clearly related to conclusions but presented separately. Recommendations should be practical and if necessary divided up for various stakeholders.

The Bi-Weekly Meeting Minutes Form (between Activity Implementers and Project Coordinator)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

1. The Lessons learned/Remarks of the elapsed period. (10 min)
2. The causes and impact of deviations from the preset activities' plan (10min)
3. The methods to remedy and future preventive measures from the deviation (30 min)
4. The coming period targeted activities

Lines of Discussion

9. ____
10. ____
11. ____
12. ____
13. ____

14.____
15.____
16.____

Decisions and responsibilities distribution:

6. ____
7. ____
8. ____
9. ____
10.____
11.____
12.____

Next meeting date:

The Monthly Meeting Minutes Form (between Project Coordinator and Project Manager)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

1. The Lessons learned/Remarks of the outputs in the elapsed period. (10 min)
2. The causes and impact of deviations from the outputs (10min)
3. The methods to remedy and future preventive measures from the deviation (30 min)
4. The coming period targeted outputs

Lines of Discussion

1. ____
2. ____
3. ____
4. ____

5. ____
6. ____
7. ____
8. ____

Decisions and responsibilities distribution:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Next meeting date:

The Bi-Monthly Meeting Minutes Form (between Project Manager and staff)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

1. New developments within the organization, modification in outputs and new projects. (10 min)
2. Evaluating the outputs visualization in the elapsed period. (10min)
3. New identified Community needs/competition. (30 min)
4. The coming period targeted outputs (10min)

Lines of Discussion

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Decisions and responsibilities distribution:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Next meeting date:

The Bi-monthly meeting Minutes Form (between project officers and program officer)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

5. Evaluating the objectives visualization in the elapsed period.
1. Dissemination of information on any developments within the program, modification in Objectives/outputs/ inputs, and new projects.
2. New identified opportunities/threats
3. The coming period targeted objectives.

Lines of Discussion

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Decisions and responsibilities distribution:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Next meeting date:

The Quarterly meeting Minutes Form (Executive Manager, Fundraising officer and Financial Officer)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

1. Evaluating the Goal visualization in the elapsed period.
2. Assessing of the short term impact.
3. Dissemination of information on any developments within the program, modification in Strategic Plan and Budget, and new projects.
4. Assessing the Goal SWOT analysis
5. The coming period targets

Lines of Discussion

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Decisions and responsibilities distribution:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Next meeting date:

The Quarterly meeting Minutes Form (Executive Manager-Board)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

1. Evaluating the Strategic Plan/Mission visualization of the elapsed period.
2. Evaluation of the organization over all operational and financial performance
3. Assessment of long term impact and sustainability of the organization and Strategic plan.
4. Modification/development in the Organization Strategies/Mission/ Vision (if any).

Lines of Discussion

1. ____
2. ____
3. ____

4. ____
5. ____
6. ____
7. ____
8. ____

Decisions and responsibilities distribution:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____

Next meeting date:

9 ANNEX IV : MEETINGS (ENGLISH TEMPLATE)

The Bi-Weekly Meeting Minutes Form (between Activity Implementers and Project Coordinator)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

5. The Lessons learned/Remarks of the elapsed period. (10 min)
6. The causes and impact of deviations from the preset activities' plan (10min)
7. The methods to remedy and future preventive measures from the deviation (30 min)
8. The coming period targeted activities

Lines of Discussion

17.____
18.____
19.____
20.____

21.____
22.____
23.____
24.____

Decisions and responsibilities distribution:

13.____
14.____
15.____
16.____
17.____
18.____
19.____

Next meeting date:

The Monthly Meeting Minutes Form (between Project Coordinator and Project Manager)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

5. The Lessons learned/Remarks of the outputs in the elapsed period. (10 min)
6. The causes and impact of deviations from the outputs (10min)
7. The methods to remedy and future preventive measures from the deviation (30 min)
8. The coming period targeted outputs

Lines of Discussion

9. ____
10. ____
11. ____
12. ____

13.____
14.____
15.____
16.____

Decisions and responsibilities distribution:

9. ____
10.____
11.____
12.____
13.____
14.____
15.____
16.____

Next meeting date:

The Bi-Monthly Meeting Minutes Form (between Project Manager and staff)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

6. New developments within the organization, modification in outputs and new projects. (10 min)
7. Evaluating the outputs visualization in the elapsed period. (10min)
8. New identified Community needs/competition. (30 min)
9. The coming period targeted outputs (10min)

Lines of Discussion

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Decisions and responsibilities distribution:

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Next meeting date:

The Bi-monthly meeting Minutes Form (between project officers and program officer)

Date:-------------------------- Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

10. Evaluating the objectives visualization in the elapsed period.
4. Dissemination of information on any developments within the program, modification in Objectives/outputs/ inputs, and new projects.
5. New identified opportunities/threats
6. The coming period targeted objectives.

Lines of Discussion

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Decisions and responsibilities distribution:

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Next meeting date:

The Quarterly meeting Minutes Form (Executive Manager, Fundraising officer and Financial Officer)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

6. Evaluating the Goal visualization in the elapsed period.
7. Assessing of the short term impact.
8. Dissemination of information on any developments within the program, modification in Strategic Plan and Budget, and new projects.
9. Assessing the Goal SWOT analysis
10. The coming period targets

Lines of Discussion

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Decisions and responsibilities distribution:

9. ____
10. ____
11. ____
12. ____
13. ____
14. ____
15. ____
16. ____

Next meeting date:

The Quarterly meeting Minutes Form (Executive Manager-Board)

Date:--------------------------   Duration:-----------/---------

Attendants

Name	Signature	Name	Signature

Meeting Agenda

5. Evaluating the Strategic Plan/Mission visualization of the elapsed period.
6. Evaluation of the organization over all operational and financial performance
7. Assessment of long term impact and sustainability of the organization and Strategic plan.
8. Modification/development in the Organization Strategies/Mission/ Vision (if any).

Lines of Discussion

9. ____
10. ____
11. ____

12.____
13.____
14.____
15.____
16.____

Decisions and responsibilities distribution:

9. ____
10.____
11.____
12.____
13.____
14.____
15.____
16.____

Next meeting date:

10 ANNEX IIV : GUIDLINES FOR DATA ENTRY, ANALYSIS AND REPORTING

Code	Name of tool	Purpose of the tool	How to use the tool	Data entry and Analysis	Utilization of results and reporting/decision making
R1	Activity information form		The activity profile captures the details of		
R2	Coordinator information form				
R3	Project Manager information form				
R4	Program Manager information form				
..					
..					
..					