

Product Description 5: Implement a Monitoring and Evaluation System for Programmes and Projects

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1. Summary

Guideline to install a Monitoring and Evaluation system including Activity Monitoring and Impact Evaluation for international programmes and projects. Not complicate but simple - nevertheless sufficient. Do not apply this M+E system for local partner organizations, but see product description 6.

2. Basic features

Target groups: Project managers, M+E staff of SME development programmes and projects.

One problem in the recent M+E discussion is that emphasis is made exclusively on "Impact evaluation". "Activity monitoring" is too boring for a "scientific-based" M+E discussion. But in our understanding activity monitoring is the basis of impact evaluation: How can you evaluate the performance and quality of a programme if you do not know what and how much has been done? Don't believe that activity monitoring is that simple - we have seen many national institutions and even international projects without any activity monitoring and systematic data collection.

- a) Activity monitoring** in business development service delivery should at least capture the following data:
- number and type of businesses involved (by business-sector, region and gender),
 - number and type of services provided,
 - number and type of trainings provided and
 - number and type of partner organisations involved and capacity building support given.

If we got these basic data, then we can proceed with impact monitoring.

Even the M+E system of an international development project can be a simple but efficient one: develop a system of **permanent activity monitoring** and data collection and hire a permanent local M+E officer.

- b) Impact monitoring** can be done periodically, once per year, using an independent local consultant. Questionnaires focussing on impact measured by parameters such as
- income generation, increased turnover,
 - business security (legal situation),
 - increased employment,

on the basis of initially defined indicators. All data should be gathered in one single M+E folder organised by separators presenting the project indicators to be achieved.

In addition to that it should be assured that an **indicator based M+E system** defines right in the beginning the sources of verification and the responsible persons for data collection:

Indicator	Reference / Source of verification	Timeframe	Responsible
Indicator 1	Where can we find the data?	When should we collect the data or	Who will collect the
Indicator 2	What kind of documents must be	collect the data or	data for this
...	elaborated to compile the data?	organize evaluation?	indicator?

... but projects often postpone filling the last three columns with the effect that nice initial planning documents are waiting for nothing to be checked.

- c) M+E Documentation.** All M+E documents should be centralised in one office folder and one office box (for big documents). The M+E folder will be organized by separators presenting the following structure:
- Initial planning documents: Project Planning Matrix, Plan of Operations.
 - One separator for each of the indicators (e.g. 12 indicators - 12 separators)
 - Project reports: Activity reports, Project Progress Review, Impact study

Behind all separators the respective documents should be filed. Especially for the indicators, put all documents proving the achievement of the indicators. Put the big documents into the M+E box.

3. Benefits, impact, scope

You will get a simple but complete Monitoring and Evaluation system including activity monitoring, impact evaluation and a very efficient M+E document management (folder method). While activity monitoring has been done by your permanent M+E officer, impact study will be done by an external local consultant.

All necessary preconditions for an external evaluation are together. When external evaluators will come, hand them over the M+E folder and don't worry.

4. Implementation process

- Don't think that activity monitoring is not necessary and easy.
- Don't wait for M+E implementation. The M+E system should be initiated in the first three, at least in the first six months of the project implementation.
- M+E is not a half-time job, if you have other jobs, you cannot do it!
- In most cases you have to hire a local permanent M+E officer who assures systematic and permanent data collection. Projects without an M+E officer are regularly in mess!
- Make sure that the planning documents are well done, complete and available.
- Start to open an M+E office folder in order to centralize all M+E data in one folder.
- Assure the regular update of the M+E folder.
- Assure periodical impact assessments by a local external and independent consultant.

5. Costs

- Full time local M+E officer
- One local consultancy month per year for impact study

6. References

Has been implemented with the following projects:

- Support to the National Federation of Artisans and Crafts in Mali (FNAM/GTZ; 1995-2004)
- SME development project Ethiopia (GTZ), see www.bds-ethiopia.net/m-and-e
- SNV (Dutch coopération) Value Chain Development in Ethiopia, M+E document see www.business-ethiopia.com/download/6-m+e-report-7-05.pdf

Can be transferred to any project and programme willing to initiate effective Monitoring and Evaluation on a cost and work effective basis.

- Product description for "Monitoring and Evaluation System" on www.bds-forum.net/m+e.htm
- M+E documents for download, Checklist for M+E, lessons learnt www.bds-forum.net/m+e.htm

7. Contact

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