

Product Description 6: Implement a Monitoring and Evaluation System with **local Partner Organizations**

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1. Summary

Guideline to install a Monitoring and Evaluation system including Activity Monitoring and Impact Evaluation with local partner organizations. (M+E for international projects see product description 5).

If this product is too simple for you, make it complicated and you will fail!

2. Basic features

Target groups: Local public and private partner organizations, chambers of commerce, NGOs

Efficient M+E systems include activity monitoring as well as impact evaluation. Activity monitoring is the basis of impact monitoring: How can you evaluate the performance and quality of an organization if you do not know what and how much has been done?

a) Initiate basic document management: Before encouraging partner organizations to implement an M+E system, initiate first the "folder method": Give them an office folder with separators of the main issues of the organization: Mission, fields of intervention, services to our target groups achieved, planning documents, activity reports, leaflet, job descriptions etc. (for more details see product description 3 "Bottom-up Organizational Development of Partner Organisations"). This office folder will be a type of presentation and self-organizing folder of the organization.

b) Initiate M+E document management: Parallel to the presentation folder initiate a second folder - the M+E folder. Do not give any details, just ask to fill the folder with the existing M+E documents. When both folders are filled, let's say after an initial time period of two months (meanwhile ask every two weeks if the respective partner organization is filling the folders), then you will know the capacity of the partner organization in service delivery as well as in document management and M+E management. Wherever possible take the existing M+E document and try to improve it.

c) Reorganize the M+E folder: There are some basic characteristics of M+E that should be visible in the M+E folder, even that of a basic local partner organization.

- **Organize activity monitoring:** The documentation should show what and how much has been done with whom and when. Discuss basic data collection with the partner organization. Probably they will suggest a wonderful data collection system with 1,200 data to be collected. Ask them to downsize in order to get a realistic data collection system which can really be managed by one of their collaborators (in product description 5 you can get some ideas for data collection for interventions in SME development).
- **Organize impact evaluation:** If indicator-based M+E systems are appropriate for international development projects with the necessary resources, we do not impose these project M+E systems on our partner organisations. Encourage the partner organization to hold periodical meetings with the business owners involved in order to discuss the strengths and weaknesses of the support given. On the basis of activity monitoring we want to know how it was done and if there has been a positive impact.

Note: This is not a SWOT to analyze the partner organization in general (see product 3), but a specific SWOT to analyze the quality of the support of the partner organization to enterprises involved. Cards will put by the entrepreneurs themselves. Staff of partner organization deals with moderation only.

Strengths	Weaknesses
What are the strengths of the support given? What was the impact for the businesses involved in terms of increased turnover and income, business security and employment?	What are the weaknesses of the support given?
Opportunities	Threats
What are the opportunities for support in future?	What are the threats for support in future?

SWOT Analysis: (Strengths-Weaknesses-Opportunities-Threats) One of the simplest but most efficient and participatory tools for impact evaluation with partners is the SWOT analysis. In group discussion, put cards

on the SWOT table. In the final report, cards are classified, discussed and comments made including recommendations.

3. Benefits, impact, scope

Taking into account that your partner organizations do not have the financial and management capacities of an international project, you will know that you cannot force an international high level M+E system on a local structure. That is why basic activity monitoring by basic data collection and basic impact evaluation by periodical SWOT analysis meetings will get better results than the useless attempt to get everything.

Together with the "folder method" you will get an immediate and complete overview on the existing M+E systems of your partner organizations involved.

Note: Be suspicious about local partner organizations with a wonderful indicator based international planning system (former gift from an international partner?). Main problem will always be the limited capacity for permanent data collection and impact monitoring. Activity reports are often rather fantastic than based on hard findings.

4. Implementation process

- Agree with some core partner organizations on organizational development and M+E system development.
 - Start with the folder method (see product description 3). Hand over an office folder to collect the main data of the partner organization.
 - Hand over an M+E folder to collect the main M+E documents.
 - Agree a system of basic data collection for activity monitoring.
 - Initiate SWOT analysis meetings of partner organizations together with their respective target groups (this SWOT has to be done by the entrepreneurs and not by the BDS staff).
 - Help to reorganize the M+E folder.
 - Planning documents
 - Activity reports and data collected
 - Impact evaluation by SWOT analysis overviews.
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5. Costs

- The partner organization should finance one permanent M+E officer.
- Small budget for visits to partner organizations and meetings.

No higher costs necessary.

6. References

The Folder method for organizational development and basic M+E systems have been implemented in Ethiopia with about 20 partner organizations, members of the Ethiopian BDS Network.

www.bds-ethiopia.net/approach-od.html

www.bds-ethiopia.net/approach-foldermethod.html

www.bds-ethiopia.net/approach-checklist-od.html

Complete manual for SWOT analysis: www.bds-forum.net/download/swot-analysis.doc 116 Kb.

7. Contact

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