



# Monitoring and Evaluation Manual

Edition no. 1

## Approval Statement

This manual has undergone comprehensive review by the Caritas Jerusalem Executive Committee on February 13, 2024, and has been officially approved by the President of Caritas Jerusalem his Beatitude Cardinal Pierbattista Pizzaballa on February 19, 2024.

The effective date of this manual is the 1<sup>st</sup> of April 2024.

  
President's Signature:





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Abbreviations:

CJ	Caritas Jerusalem
MEAL	Monitoring, Evaluation, Accountability and Learning
M&E	Monitoring and Evaluation
APR	Annual Project Report
PDM	Post Distribution Monitoring



## Chapter 1: Overview of Monitoring, Evaluation, Accountability and Learning

### 1.1 Introduction

Caritas Jerusalem is a humanitarian and development organization that represents the socio-pastoral services of the Catholic Church in the Holy Land. It was founded in 1967 in the aftermath of the Six Day War. Caritas Jerusalem helps individuals from all religious backgrounds in the Occupied Palestinian Territories. Caritas Jerusalem is a member of Caritas Internationalis, a confederation of 162 Caritas organizations operating in more than 200 countries.

### 1.2 Purpose of the Monitoring, Evaluation, Accountability and Learning Manual

Recognizing the paramount importance of ensuring the quality control of programs and projects, Caritas Jerusalem acknowledges the imperative need for diverse mechanisms and tools for effective monitoring, evaluation, accountability, and learning. The development of a MEAL manual is considered indispensable, serving as a pivotal tool that significantly contributes to enhancing program effectiveness, efficiency, impact and sustainability. The manual systematically outlines the objectives, methodologies, and key components of the MEAL framework, ensuring that programs/ projects are not only monitored and evaluated effectively but are also held accountable to stakeholders. Aligned with modern management principles, Caritas Jerusalem's developmental aspirations encompass sustainable progress, the enhancement of health services, the upliftment of social welfare, ensuring food security, and fostering livelihoods. The organization actively pursues these objectives through a multifaceted approach, including advocacy, the facilitation of micro-credit loans, education initiatives, charitable endeavors, emergency interventions, and direct service provision.

This manual-based approach places a deliberate emphasis on outcomes, highlighting the significance of strategic partnerships and collaborative efforts. Recognizing that achieving desired results independently is a daunting task for any single organization or development actor, Caritas Jerusalem actively promotes a culture of ownership and collaboration. The skills essential for effective monitoring and evaluation align with key functions such as strategic planning, teamwork, analytical prowess, continuous learning, advisory capabilities, and formulation skills. This framework necessitates a fundamental shift in the mindset and behaviors of staff, emphasizing a reduced focus on inputs and implementation tasks while prioritizing the tangible results, both in terms of outcomes and outputs.

The Monitoring, Evaluation, Accountability and Learning (MEAL) system assumes a pivotal role for senior office management and program management, facilitating comprehensive assessments at all levels of programming. This assessment encompasses:

- (a) Progress towards outcomes
- (b) Contribution of Caritas Jerusalem to outcomes through program-generated outputs
- (c) Programs and other activities
- (d) The partnership strategy

### 1.3 Updates

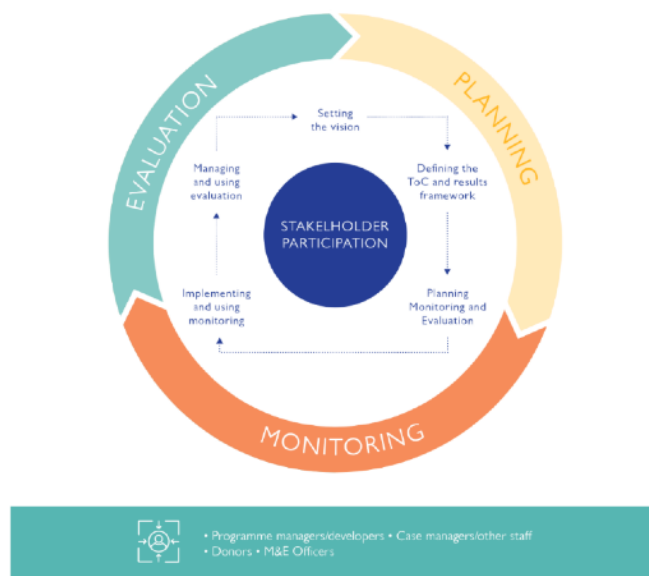
Acknowledging the dynamic nature of organizational processes, any modifications to the manual mandate approval from the Secretary General and the esteemed Board of Directors. This ensures unwavering adherence to organizational standards and guidelines, reinforcing a commitment to excellence and effectiveness.

## Chapter 2: Guiding Principles and Elements of Monitoring, Evaluation, Accountability and Learning

Monitoring, Evaluation, Accountability, and Learning (MEAL) has evolved into an integral and anticipated facet of any development program or project. The fundamental purpose of MEAL is to gauge the extent to which an operational design adheres to its planned implementation and the degree of success in achieving intended results. Moreover, MEAL encompasses a commitment to accountability, ensuring that programs are transparent and answerable to stakeholders. It also emphasizes organizational learning, facilitating the continuous adaptation and improvement of strategies based on collected data and insights. This section serves as an introduction to MEAL, delineating key components and principles essential for establishing and enhancing an effective MEAL system that not only assesses program implementation but also upholds accountability and promotes a culture of ongoing learning within the organizational framework.

### 2.1 The Difference Between Monitoring and Evaluation

Amidst the intricacies of M&E, a crucial distinction exists between monitoring and evaluation, warranting clarification for clarity. Monitoring involves the routine, daily assessment of ongoing activities and the continuous tracking of progress. On the other hand, evaluation constitutes the periodic assessment of overall achievements, aiming to discern the tangible impact and effectiveness of the undertaken endeavors. In essence, monitoring scrutinizes the ongoing processes and actions, while evaluation delves into the outcomes and the broader impact that has been realized. This distinction provides a foundational understanding crucial for navigating the intricacies of M&E.



## 2.2 Planning Monitoring & Evaluation: Fostering Adaptability, Accountability, and Continuous Learning

Within the Monitoring and Evaluation (M&E) framework, Caritas Jerusalem (CJ) adopts a dynamic approach, steering away from rigid, detailed procedures. Instead, CJ recognizes the necessity to tailor monitoring and evaluation designs based on the unique needs of partners, projects, programs, or outcomes. This approach underscores the significance of planning in the broader context of management's comprehensive efforts. This approach recognizes the interconnected nature of planning, accountability, and learning within CJ and its stakeholder community.

In this context, the planning of monitoring and evaluation assumes a pivotal role for CJ and its stakeholders. It is intricately woven into the fabric of overall management practices. CJ acknowledges that a one-size-fits-all approach is impractical given the diverse nature of projects and programs. Hence, the organization places emphasis on a bespoke planning process that considers the specific characteristics and requirements of each intervention, ensuring that planning serves as the foundation for not only effective monitoring and evaluation but also fostering accountability and facilitating continuous learning.

To determine the most fitting tools for assessing progress towards outcomes and project contributions, CJ undertakes a holistic review. This involves a comprehensive examination of all projects and programs intended to contribute to a specific outcome. The nature of these interventions is scrutinized, and this scrutiny informs the selection of appropriate tools. The goal is to align monitoring and evaluation strategies with the intricacies of each initiative, ensuring a nuanced and effective approach that

resonates with the diverse nature of CJ's endeavors. This holistic approach to planning reflects CJ's commitment to adaptability, accountability, and a culture of continuous learning in its M&E practices.

### 2.2.1 Monitoring

Monitoring serves as a critical tool for the systematic assessment of the performance and progress of Caritas Jerusalem's (CJ) interventions, specifically aimed at achieving outcomes at the project level. In practical terms, monitoring extends its purview to assess the performance and progress of projects, programs, partnerships, and the outcomes of assistance. The information derived from monitoring acts as the foundational basis for decision-making and prompt action. While it caters to immediate decision-making needs, its significance extends to contributing essential data for long-term knowledge-building.

Under the overarching umbrella of management, monitoring assumes an even more crucial role. It transforms into a strategic tool for decision-making and learning, providing indispensable information and data for evaluations. The management team gains the opportunity to establish coherence in monitoring practices, fostering ownership by dealing with consistent results across all program instruments.

At various programming levels, CJ progressively directs its focus toward higher-level results. This entails project reporting primarily on outputs, with some levels delving into outcomes, and others aiming at broader goals. The selection of monitoring tools aligns with the specific needs of each level. Monitoring outcomes may necessitate a different mix of tools compared to those traditionally employed at the project level. This could involve methods such as review, analysis, or surveys, deviating from conventional field visits or meetings.

Within a framework centered on progress towards outcomes and CJ's contribution to them, collaboration between the CJ project manager and the MEAL Officer becomes pivotal. Together, they are tasked with determining the right mix of monitoring tools and approaches for each project, program, or outcome. This involves ensuring that monitoring strikes an appropriate balance across three key characteristics:

(a) Reporting: Involves obtaining and analyzing documentation from the project that provides information on progress. Examples include the Annual Project Report (APR), progress report, quarterly report, work plan, and annual organizational report.

(b) Validation: Encompasses checking or verifying whether the reported progress is accurate. This could involve field visits, spot-check visits, external assessments, client surveys, and evaluations.

(c) Participation: Involves obtaining feedback from partners and beneficiaries on progress and proposed actions. Mechanisms such as outcome groups, steering committee/mechanism, stakeholder meetings, focus group meetings, and annual reviews facilitate this participatory approach. The review of annual organizational reports retains its central role in performance monitoring and reporting. This process is



grounded in a highly consultative annual review exercise that interconnects reporting, feedback, evaluation, and learning to comprehensively assess performance.

#### Monitoring tools

Effective monitoring relies on a carefully selected set of tools to validate reported results and ensure accountability. Caritas Jerusalem employs various tools tailored to its projects, emphasizing the importance of both field visits and a nuanced approach to outcome-focused monitoring.

#### Regular Field Visits:

- **Key Instrument for Validation:** Regular field visits emerge as a crucial instrument for validating results reported by projects, especially for larger, pivotal projects. These visits are instrumental in ensuring the accuracy and reliability of reported outcomes.
- **Joint and Clustered Approaches:** To enhance the depth of analysis, visits may increasingly adopt a joint format, involving multiple stakeholders. This collaborative approach may extend to clustered projects within a common outcome, facilitating a comprehensive and detailed analysis of results.
- **Post Distribution Monitoring (PDM):** In projects involving distributions, Post Distribution Monitoring (PDM) is integral. It serves as a specialized tool to assess the impact of distribution efforts, ensuring accountability and identifying areas for improvement in the distribution process.

#### Monitoring Focus on Outcomes:

**Implementation Aspect Monitoring:** While the primary focus of monitoring is directed towards outcomes, it's essential to concurrently monitor aspects of project implementation at the ground level. This dual focus ensures accountability and a holistic understanding of project dynamics.

**Interactions with Project Staff and Stakeholders:** Regular interactions with project staff and stakeholders serve as a valuable source of detailed information on implementation challenges, ongoing activities, resource inputs, and expenditure. This continual engagement provides insights essential for effective decision-making.

#### Challenges of Weak Management or Accountability:

**Limitations of Monitoring:** It's important to acknowledge that monitoring, while a powerful tool, has limitations. It may not be the panacea for addressing more permanent issues related to weak



management or accountability. Persistent challenges in these areas may require alternative strategies and interventions.

In summary, Caritas Jerusalem recognizes the significance of regular field visits as a primary tool for result validation, emphasizing collaboration and detailed analysis. The monitoring approach remains outcome-centric, supplementing it with a necessary focus on implementation details for accountability.

### 2.2.2 Evaluation

In acknowledging the historical focus of evaluations on projects and programs, Caritas Jerusalem (CJ) recognizes the need for a paradigm shift. While traditional evaluations primarily aimed to assess the attainment of project objectives outlined in documents, CJ is now committed to a more holistic approach that transcends mere accountability.

The recalibration emphasizes that the focus on accountability should not be construed as a judgment but rather as a catalyst for performance improvement. CJ sees project evaluations as potent tools not only for decision-making within the project's scope but also as instruments with a profound impact on organizational learning beyond specific projects.

Importantly, CJ acknowledges that assessing performance solely based on achieving project objectives is limiting. The organization embraces a broader perspective, emphasizing the transformative impact of assistance on individuals' lives within specific development contexts. Consequently, CJ is pivoting towards evaluating interventions at the outcomes level, recognizing that this lens provides a more comprehensive understanding of the effectiveness of its activities in instigating tangible and positive changes that add value to lives.

The planning of evaluations is considered a proactive and integral part of the project life cycle. Initiating at the formulation stage, the planning process is dynamic, continuously adapting to local needs and evolving program dynamics. This strategic and iterative planning approach enables CJ to make informed decisions about what, when, and why to evaluate, aligning evaluations with the evolving context and programmatic developments.

As a commitment to robust evaluation practices, CJ mandates the preparation of an evaluation plan within the first quarter of each project implementation. This plan serves as a guiding framework to ensure that evaluation activities stay on course. It not only facilitates compliance monitoring but also becomes a foundational document for management. The management leverages the plan as a basis for monitoring and ensuring adherence to the evaluation framework, thereby fostering a culture of continuous improvement and accountability within the organization.

Evaluation serves as a cornerstone in Caritas Jerusalem's commitment to accountability, providing a multifaceted approach to organizational improvement and learning. The pivotal role of evaluation is underscored by several key functions within the organization:

**Credibility and Validation:** Evaluation is a linchpin for ensuring accountability through the credibility of results and validation of reporting. By subjecting projects and programs to rigorous evaluation, Caritas Jerusalem establishes the integrity of reported outcomes, enhancing transparency and trust.

**Independence and Neutrality:** The independence and neutrality embedded in the evaluation process are crucial. Caritas Jerusalem recognizes that an unbiased, fact-based perspective is essential for an authentic assessment of its initiatives. Independent evaluations provide an objective view, mitigating potential biases and ensuring a fair appraisal of achievements and challenges.

**In-Depth Problem Analysis:** Evaluation serves as a diagnostic tool, enabling a profound and comprehensive analysis of problems. By delving into the root causes of challenges, Caritas Jerusalem gains insights that go beyond surface-level observations. This depth of understanding empowers the organization to make informed decisions for course correction and improvement.

**Tool Generation for Consensus Building:** The findings and insights generated through evaluations become powerful tools for consensus building. Caritas Jerusalem recognizes that a shared understanding of project outcomes and challenges is foundational for collaborative decision-making. Evaluation results facilitate constructive dialogues among stakeholders, fostering consensus on strategic directions and areas of improvement.

**Learning Mechanism:** Evaluation is intrinsically tied to learning within Caritas Jerusalem. By systematically analyzing successes and failures, evaluations become rich sources of knowledge. The lessons derived contribute to organizational learning, enabling the refinement of strategies and approaches for future initiatives. The iterative nature of this learning process positions Caritas Jerusalem as an adaptive and forward-thinking organization.

In alignment with these principles, Caritas Jerusalem acknowledges the importance of strategic management of evaluations. The organization commits to conducting a judicious number of outcome evaluations during the project cycle, taking into consideration the total available resources, past evaluation workloads, and the imperative to validate results. This strategic approach ensures that evaluations are not only impactful but also resource-efficient, maximizing their contribution to organizational growth and development.

### 2.2.3 Accountability



Within Caritas Jerusalem's (CJ) framework, accountability is a cornerstone that permeates all aspects of its operations. The organization recognizes that being accountable is not just a responsibility but a commitment to transparency, integrity, and stakeholder trust.

CJ places a strong emphasis on transparent reporting mechanisms to stakeholders, ensuring that the results of monitoring, evaluation, and learning efforts are communicated clearly and comprehensively. Regular and accurate reporting, such as the Annual Project Report (APR), progress reports, and other documentation, not only serves as a tool for accountability but also as a means to foster open communication with stakeholders.

At CJ, safeguarding the well-being of the people they serve, communities, partners, volunteers, and staff is a top priority. The organization ensures that individuals within its sphere have the means to voice any perceived shortcomings, express concerns, or report misconduct through channels that are not only appropriate but also safe, accessible, and strictly confidential. CJ is deeply committed to fortifying a culture of responsibility that not only addresses wrongdoings and abuses but actively prevents them through comprehensive prevention initiatives and training programs.

In line with this commitment, CJ has established a robust feedback mechanism. This mechanism provides all stakeholders with the opportunity to submit complaints or feedback, facilitated through dedicated staff and specialized contact numbers. This ensures that the feedback process is easily accessible and that individuals can express their concerns confidently, knowing that their voices will be heard and treated with the utmost confidentiality and seriousness. CJ's commitment to accountability is not only reflected in its proactive prevention measures but also in its responsive mechanisms that empower stakeholders to actively contribute to the organization's continuous improvement and commitment to ethical practices.

#### 2.2.4 Learning

Within the dynamic framework of Monitoring, Evaluation, Accountability, and Learning (MEAL), Caritas Jerusalem (CJ) actively cultivates a culture that encourages continuous learning and embraces the principles of adaptive management. CJ recognizes that learning is a fundamental component of its success, intertwined with the adaptive capacity needed to navigate the complexities of development work effectively.

CJ's commitment to organizational learning is evident in its approach to three interconnected concepts crucial to the MEAL processes:

1. Knowledge Creation: The organization acknowledges that new knowledge is cultivated by synthesizing the data collected through MEAL processes with existing information or by discovering innovative ways to organize existing knowledge. This process fuels the evolution of insights and strategies, fostering a dynamic and informed decision-making environment.

2. Knowledge Transfer: CJ understands that organizational learning is incomplete until knowledge is disseminated across the entire organization. This transfer occurs through person-to-person interactions and via knowledge platforms strategically employed to share information seamlessly across programs, offices, and locations. The collaborative dissemination of knowledge enhances the collective capacity to adapt and respond effectively to evolving challenges.
3. Knowledge Retention: Organizational learning is not just about acquiring new knowledge but embedding it into processes and activities at various levels – from individual projects to overarching organizational and sectoral strategies. The MEAL cycle, designed as a circular process, serves as a mechanism to continually embed learning into the fabric of the organization's work, fostering a culture where knowledge retention is integral to ongoing improvement.

Active learning is a cornerstone of CJ's approach, involving continuous engagement with project staff, stakeholders, and beneficiaries. This active learning encompasses ongoing reflections, discussions, and assessments, ensuring that insights are not only acquired but also actively applied to enhance project effectiveness.

End-of-project learning is an integral part of this process, as insights gathered during the evaluation phase are seamlessly tied to broader learning objectives. The evaluation serves as a critical juncture for extracting lessons, refining strategies, and feeding into the knowledge creation, transfer, and retention processes within the organization.

In summary, CJ's dedication to learning is not just a theoretical commitment but a tangible and dynamic element embedded in the organization's ethos. This approach, rooted in the principles of adaptive management, positions CJ to continually evolve and enhance its impact in the ever-changing landscape of development work.

#### 2.2.5 The Purpose for MEAL System for Programs

The purpose of a Monitoring, Evaluation, Accountability and Learning (MEAL) system for programs is multifaceted, aiming to:

- ✓ Provide continual feedback on project components and processes,
- ✓ Detect contextual shifts and changes in the status of the target population,
- ✓ Inform decisions on operations, policy, or strategy,
- ✓ Facilitate accountability for project resources to donors and participants,
- ✓ Demonstrate positive, sustainable results of project activities,
- ✓ Identify successful strategies for extension, expansion, or replication,
- ✓ Modify unsuccessful strategies,

- ✓ Capture lessons and knowledge on what works and what does not,
- ✓ Give stakeholders an opportunity to have a say in the program,
- ✓ Provide an accurate determination of program impact,

Realizing the full potential of an MEAL system requires program personnel to actively track changing levels of risk, vulnerability, and coping strategies. This ongoing monitoring is crucial for effectively managing responses to contextual shifts and establishing the necessary interventions for program design.

### Chapter 3: Key Principles for Good Monitoring and Evaluation

Caritas Jerusalem (CJ) is committed to adhering to best practices in both the scope and conduct of monitoring and evaluation (M&E). Within these principles, CJ has the flexibility to determine tools, formats, timing, and schedules, ensuring that M&E serves as valuable input to the management team for effective results-based management.

#### 3.1 Scope

The essential focus of M&E is on results, encompassing both outcomes and outputs. M&E endeavors to assess the performance and contributions of programs and projects towards intended outcomes. All monitoring and evaluation efforts within CJ should address the following:

##### (a) Progress towards outcomes

This involves periodic analysis to determine the extent to which intended outcomes have been or are being achieved. Evaluations play a crucial role in verifying outcome achievement and explaining the factors contributing to success or failure. The value of evaluation is dependent on monitoring tools that incorporate assessments of outcome progress and a comprehensive scan of the development situation.

##### (b) Contribution of CJ towards outcomes

This implies monitoring the outputs generated by CJ through projects, programs, and activities, analyzing whether the outputs align with the set outcomes. Recognizing the adaptability within key principles, areas facing crises or post-conflict situations should be able to adjust M&E approaches as needed. The assessment should ensure that outputs are being produced as planned and, importantly, whether they contribute to the desired outcomes.

##### (c) Partnership strategy

Monitoring and evaluation often extend to the partnership strategy for the outcome. This involves assessing the design, formation, and functioning of partnerships. The objective is to ensure that partners involved in an outcome share a common understanding of problems and needs, and their strategies are synchronized.

The above three elements represent the minimum scope for monitoring and evaluation. CJ may include additional elements as needed for management or analysis, always ensuring that the scope remains realistic in view of available capacities.

### 3.2 Execution

The execution of monitoring and evaluation (M&E) plays a pivotal role in establishing the credibility of findings and assessments. For Caritas Jerusalem (CJ), effective monitoring and evaluation involve:

- (a) Focus on progress towards intended results and follow-up with decisions and action,
- (b) Regular reporting from Project Management to the management with partners presenting issues and seeking solutions to problems, as a basis for analysis,
- (c) Regular monitoring visits or checks by the monitoring team to verify and validate progress,
- (d) Use of participatory monitoring mechanisms to ensure commitment, ownership, and follow-up and feedback on performance,
- (e) Use of indicators and making efforts in improving the performance measurement systems and developing baselines at all programming levels,
- (f) Assessing the relevance, performance and success of CJ development interventions,
- (g) Actively learning and improving to adapt strategies and generating lessons and sharing them,
- (h) Active planning, conduct and use of evaluations of intended outcomes for validation of results, as well as initiative to undertake additional, voluntary evaluations when useful.

## Chapter 4: Roles and Responsibilities

Every staff member at Caritas Jerusalem (CJ) plays a distinct role in the monitoring and evaluation process, with specific perspectives and responsibilities. General responsibilities include:

**CJ Management:** The management is intricately involved in strategically choosing monitoring and evaluation mechanisms. Collaborating closely with key stakeholders, especially funding and coordinating agencies, their role is to ensure that the program aligns optimally with the organization's goals. This involves active leadership from the MEAL officer, annual assessment, partnership strategy development, and promoting a shift toward effective monitoring, evaluation for results, and a learning environment. The management sets the framework for managing results, prioritizes work planning and partnerships, and ensures follow-up to evaluations, including developing management responses and overseeing their implementation. They also facilitate periodic assessments to confirm that the chosen approach is the most effective means of achieving intended outcomes.

**CJ Management, Including Project Manager and Monitoring and Evaluation Officer:** This team is responsible for the overall monitoring of the project's strategic outputs and progress toward outcomes. They deliver outcome evaluations by analyzing multiple projects, activities, and data based on an annual performance assessment, extracting lessons learned around outcomes. They contribute value to project work, provide soft assistance to influence outputs positively, and play a pivotal role in program design to ensure alignment with strategic priorities. They also assist in developing accountability mechanisms, periodically monitoring resource usage, and allocate time for result analysis.

**Project Management:** Project management is responsible for delivering project outputs, overseeing implementation, managing inputs, and ensuring sound administrative management. They monitor implementation tasks by other contractors, develop project work plans, and submit quarterly project reports to the General Secretary. This enables them to provide crucial information and lessons learned regarding the effectiveness of the implementation strategy and output delivery.

**Monitoring, Evaluation, Accountability and Learning (MEAL) Officer:** The MEAL officer has a crucial role in establishing an effective monitoring and evaluation system. Their responsibilities, among others, include preparing an overall and annual M&E plan, generating semi-annual and annual M&E reports, specifying technical aspects for each M&E component, contracting external agencies for component management, supervising the quality and timeliness of outsourced M&E products, and reviewing contracted products to communicate implications for program implementation. M&E must play a central role in shaping program direction.



## Chapter 5: Objectives of the Monitoring, Evaluation, Accountability and Learning Manual

1. **Evaluate Suitability:** Assess the alignment of implemented projects and services with the needs of rights holders.
2. **Assess Resource Efficiency:** Evaluate the efficiency of resources utilized in project implementation, gauging their effectiveness in contributing to project or program outputs.
3. **Evaluate Effectiveness:** Assess the overall effectiveness and capability of implemented programs, projects, and services in achieving their intended objectives.
4. **Verify Sustainability:** Verify the sustainability of projects in targeted areas, ensuring their continued impact and relevance.
5. **Measure Impact:** Measure the impact of projects, both direct and indirect, and their contribution to positive outcomes.
6. **Support Continuous Improvement:** Provide a mechanism for documenting and disseminating lessons learned, best practices, and recommendations to facilitate continuous improvement in program implementation and management.

These specific objectives collectively contribute to the overarching goal of enhancing the quality, impact, and sustainability of projects undertaken by the organization, fostering continuous improvement and alignment with the needs of the communities served.

## Chapter 6: Defining Evaluation Criteria that the Organization will Follow in Evaluating

Evaluation	Evaluation is an organized process that is conducted as systematically and impartially as possible for an activity, project, program, strategy, policy, topic, theory, sector, operational area, or organizational performance, through which the level of achievement of both expected and unexpected results is analyzed by examining the Results Chain, processes, contextual and causal factors using appropriate criteria such as appropriateness, effectiveness, efficiency, impact, and sustainability.
Evaluation Criteria	Measurement tools are used to determine the level of performance and implementation based on specific criteria for achievement, and each criterion must test a set of indicators that show its effectiveness in managing and implementing the project.
Relevance	A criterion for measuring the relevance of the link of programs, projects and activities to the priorities and policies of the target group, the right holder, and the donor.
Effectiveness	A criterion for measuring the extent to which the program, project or activity allocated to assist into achieving its ultimate objectives.

Efficiency	A criterion to measure the extent to which a project uses the lowest possible cost of resources to achieve the desired results.
Sustainability	A criterion for measuring whether the benefits resulting from the program, project or activity are likely to continue after the withdrawal, cessation, or termination of donor fundings.
Impact	Positive and negative changes resulting from a development intervention, directly or indirectly, intentional, or unintentional.

## Chapter 7: Stages to be Followed in the Development of a Monitoring and Evaluation Plan

The development of a monitoring and evaluation (M&E) plan for any project involves collaboration between the MEAL Officer and the project team. This collaboration unfolds through six stages, preceded by the preparation stage. This initial phase encompasses team building, methodology definition, and consensus establishment on the objectives of the M&E plan, along with the work guidelines. Figure (1) illustrates the sequential stages of the undertaken work. It is crucial for M&E systems to prioritize simplicity, as overly complex systems tend to accumulate more data than they effectively utilize, increasing the likelihood of failure.

Figure 1: Stages of Development of Monitoring and Evaluation Matrix



### Stage One: Identify the Components of the Program/Project

The initial stage involves identifying the various components comprising the program or project. This includes a detailed description of the primary axes covered by each component, outlining the key interventions. Additionally, outputs are precisely determined, following a structured model.

Figure 2: Work Axes and Program Limits

Components	Component 1	Component 2	Component 3	Component 4	Component 5
Output 1					
Output 2					
Output 3					

#### Stage Two: Determine the Expectations of Stakeholders

The monitoring and evaluation system seeks to provide information to all stakeholders in the program, whether for leadership and guidance, knowledge building, report writing purposes or other considerations. The project/program manager represents the most important party in the monitoring and evaluation process and forms the link between all relevant parties. The table below shows a model for identifying and describing the relevant parties and the information they need for monitoring and evaluation purposes.

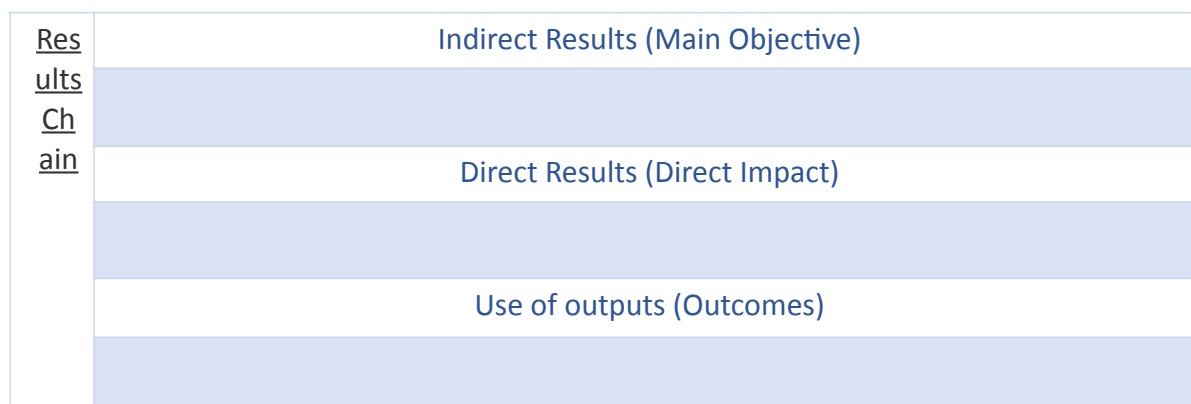
Relevant Party	Information needs from the information system
Board of Directors and Senior Management of CJ Organization	<ul style="list-style-type: none"> <li>- Information of the plans and reports annually for the program/project.</li> <li>- Periodic information of the chain of desired outcomes of the program and the impact evaluation (indicators at the level of direct and indirect outcomes and benefit from outputs).</li> <li>- The financial situation of the project and the relationship with the financing organizations.</li> </ul>
Project Manager:	<ul style="list-style-type: none"> <li>- Expenditures are according to the project plan and approved expenditure items.</li> <li>- Administrative and financial procedures used compared with the Administrative Manual.</li> <li>- The outcomes of the services achieved at the level of the target groups.</li> <li>- Problems facing the staff in the implementation of the project.</li> </ul>

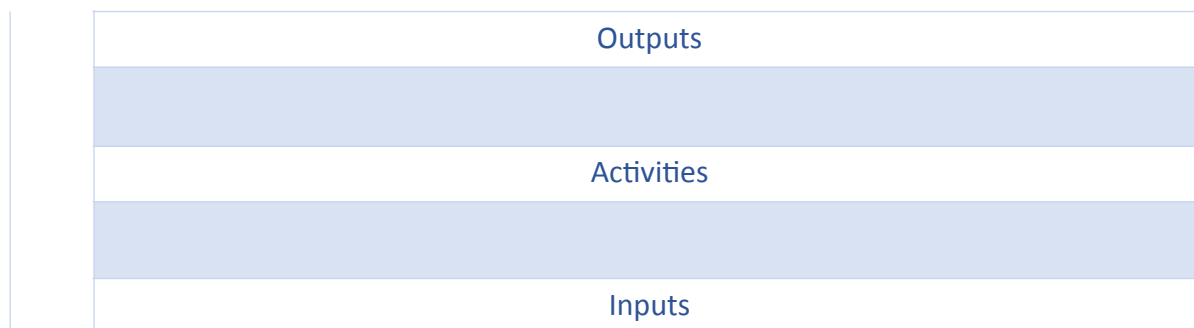
Advisory Committee	<ul style="list-style-type: none"> <li>- Periodic information related to the desired chain of outcomes for the program.</li> <li>- The progress of services, administrative and financial procedures followed, in addition to the extent to which outcomes have been achieved.</li> </ul>
Donors Funding Organization for program	<ul style="list-style-type: none"> <li>- Expenditures on project services according to the work plan and expenditure items.</li> <li>- The category that was targeted in the program.</li> <li>- Updates on progress and the impact of the project and results achieved at the level of outputs and outcomes.</li> </ul>
Field officials (Coordinators and others) / Project Team	<ul style="list-style-type: none"> <li>- The workflow in services in terms of quantity and adherence to internal procedures.</li> <li>- Information about applicants for services according to the selection criteria for each service.</li> <li>- Frequent updates on the status of the project indicators. This information is used to track progress and inform decisions.</li> <li>- The initial impact of services.</li> </ul>
Formal and Informal Community organizations	<ul style="list-style-type: none"> <li>- Information related to project output and outcomes.</li> <li>- Project achievements in terms of outputs and impact.</li> <li>- Selection criteria for participants from the services provided by the program.</li> </ul>

### Stage Three: Identify the Results Chain of the Program/Project

The Results Chain is crucial for effective monitoring and evaluation, as it establishes a logical connection between different levels of results, ensuring that the program's activities lead to the desired outcomes and impacts.

Figure 3: A Model Showing the Results Chain





These levels are introduced in figure 3 above. Each level is connected to the next, in a clear, logical way.

1. Indirect Results (Main Objective): Represents the broad main objective of the program contributing to long-term goals at the sectoral or national level.
2. Direct Impact: Medium-term outcomes resulting from the use of the program's services, measuring the program's effectiveness and direct benefits to the rights holders.
3. Use of Outputs: Short-term outcomes achieved after using or benefiting from the program's outputs. This phase involves the short-term results and serves as the link between program management and subsequent stages of the Results Chain.
4. Outputs: Services, activities, or products provided by the program to rights holders. These are under the control of program management and are essential for achieving outcomes.
5. Activities: Tasks and actions conducted using available inputs (resources) to achieve outputs (services).
6. Inputs: Resources such as people, training, equipment, and other elements invested in the project to achieve outputs.

Understanding and clearly defining each element in the Results Chain is vital for the monitoring and evaluation process. The chain's logical structure ensures that activities at each level contribute coherently to the overall goal. This concept intersects conceptually with the logical framework, providing a comprehensive view of the program's structure and expected outcomes.

#### Stage Four: Identify the Results Indicators within the Results Chain

In Stage Four, the emphasis is on pinpointing results indicators for project components, covering the main sections of the results chain that involve direct and indirect impacts, outcomes, and outputs. This process includes the identification and formulation of indicators while setting a specific time frame. Results indicators can take diverse forms, including quantitative, qualitative, or a combination of both. These indicators serve to quantify or qualify how well outcome-based objectives are met, providing a means to assess the achievement of the project's overarching goal. The use of performance indicators

enables project teams to make well-informed decisions promptly, assessing whether the project is proceeding according to plan or if corrective measures are necessary.

#### Stage Five: Design an Action Plan to Monitor the Key Performance Indicators (KPI)

The Performance Indicators Survey Matrix is developed through a discussion involving the project team and the Monitoring and Evaluation Manager. The verification plan is agreed upon using the matrix model. When designing the matrix, we consider a range of internal factors that affect the selection of verification tools as well as the possible balance to measure each indicator. Sometimes, the verification tools to be used are not necessarily the best tools, but rather are possible tools within the available resources and time frame.

Monitoring and evaluation tools are divided into two main parts:

1. Tools to monitor the progress of the program and its various components that document the progress in the achievement of outputs, processes, procedures, and expenditures that have been made to achieve the outputs as shown in the following table A.
2. Tools to verify performance indicators at all stages of the results chain, as shown in the following matrix model:

Results Chain	Results Indicators	Output measures	Necessary questions or information	Collection of information	Responsibility	Time	From:	To:
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The questions in the Performance Indicators Survey Matrix are used in the baseline study, where data is entered into the database of all rights holders. The results of the analysis are used for comparison at the end of the project.

The baseline study includes performance indicators for direct and indirect outcomes taking advantage of either the application forms that has been completed by the rights holders at the stage of selection them, or special forms that are obtained from the rights holders at the beginning of the project.

Table A:

Tool	Content	Reviews
Periodic Reports of Activities	The quantity and value of the completed outputs, The number of rights holders, The expenditures as agreed in the budget. Reports of partner organizations are also discussed.	Register in the information base and accounting system. Prepared by the project manager and assisted by the coordinators and partner organizations
Focus groups or group meetings with rights holders (During implementation and at the end).	General information about the utilization of outputs (outcomes), which is used to measure the impact at the end of the project.	It is carried out by the Monitoring and Evaluation Manager with the participation of the project manager to be done during the implementation of the project and by the external evaluator at the end of the program.
Questionnaire (Pre-implementation, during implementation and at the end)	Focuses on the direct benefit that rights holders have gained due to receiving services, and Focuses on the eventual impact of the program.	It is carried out by the monitoring and evaluation manager with the participation of project managers and coordinators at the beginning, middle and the end of the project by completing the questionnaire for a selected sample. While the external evaluator participates at the end of the project.
Regular meetings with project team	Focuses on the difficulties faced by employees, the extent to which services are utilized, recommendation of adjustments, and developing interventions based on the experience and implementation expertise.	It is carried out periodically by the project manager during implementation.

## Stage Six: Communicate with Relevant Parties

This involves the communication of the monitoring and evaluation process through reports containing data related to performance indicators. These reports are periodically analyzed using the indicator verification matrix and presented in a format that facilitates access, understanding, guidance, and decision-making for project stakeholders. Throughout the implementation stages, the following relevant parties should receive oral and written reports:

### 1) Project Team:

- Monthly regular meetings between the Project Manager and team members to present progress reports, data on objective achievement, indicators, lessons learned, and discuss plans for the next month based on the project's general plan.
- Submission of bimonthly reports to the General Secretary of CJ Organization, including meeting minutes and highlighting any issues that need resolution to resume work.
- Emphasis on the exchange of experiences and information among team members for problem-solving.

### 2) Partners Group:

- Regular meetings with partners where the project manager discusses project conditions, output achievement levels, and various performance indicators.
- Reviewing results, addressing achievements, failures, and problems hindering the results chain, and proposing modifications to improve the situation.

### 3) Project Supervisory Committee:

- Invitations for a regular meeting, for example, quarterly, where the project manager and supervisor at CJ Organization discuss work progress, problems, and challenges facing program management, documented in meeting minutes.

The Monitoring and Evaluation Officer formulates specific questions directed at the relevant parties to maximize the utility of these meetings or reports. Sample questions include:

- Were the planned services delivered adequately and timely to ensure the benefit of the rights holders within the cost limits?
- What challenges exist in service delivery, and how can they be addressed?
- What lessons have been learned from previous work that can be integrated into internal procedures?
- Are the current specifications and procedures for service implementation still effective, or do they need modification?
- Have rights holders benefited from the various services received, and what changes are needed to enhance their benefit?
- What positive effects have resulted from utilizing different types of services?



- Is there any negative impact of our services, and how can it be mitigated?
- What actions or improvements are required to ensure that services achieve desired results for rights holders?
- Are there new ideas that can be adopted to ensure better direct and indirect results?

## Chapter 8: Monitoring and Evaluation Reports

In order to achieve optimal results efficiently and effectively, the issuance of monitoring and evaluation reports is recommended on an annual and semi-annual basis. It is important to note that the proposed reports exclude periodic reports used for project progress, administrative and financial monitoring, which are comprehensively documented in the project work manual.

Semi-annual monitoring and evaluation reports primarily concentrate on quantitatively measuring the indicators of achieved outputs and outcomes. These reports compare desired outputs with actual outputs, drawing from field data collection and a thorough examination of periodic activity reports, which serve as fundamental references for semi-annual reporting. To enhance the depth of analysis, a focus on disaggregated data is integrated into these reports, allowing for a detailed examination across different demographic groups or other relevant variables.

Annual monitoring and evaluation reports gauge progress by assessing performance indicators, output achievement, and the utilization of outputs. These reports also analyze indicators related to the achievement of direct results. They are grounded in comprehensive reviews, including activity and service reports, field interviews with project officials, and the annual review form encompassing all provided services.

Communication plays an integral role in the monitoring and evaluation process. Reporting stands out as the most common method for sharing M&E results and lessons learned. It involves the systematic and timely provision of essential information at regular intervals. Various communication channels, such as formal progress reports, special studies, informal briefs, workshops, discussions, posters, pamphlets, and meetings, can be utilized for information dissemination. Typically, the project design document or proposal outlines reporting requirements, specifying the recipients of the report and the frequency of reporting. These requirements primarily cater to the accountability of funding agencies. Internally, the project must share M&E results across different departments or sections. Additionally, communicating M&E findings to other stakeholders is crucial for various purposes.