

Project Monitoring Course

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Lecture 01: Introduction to Monitoring

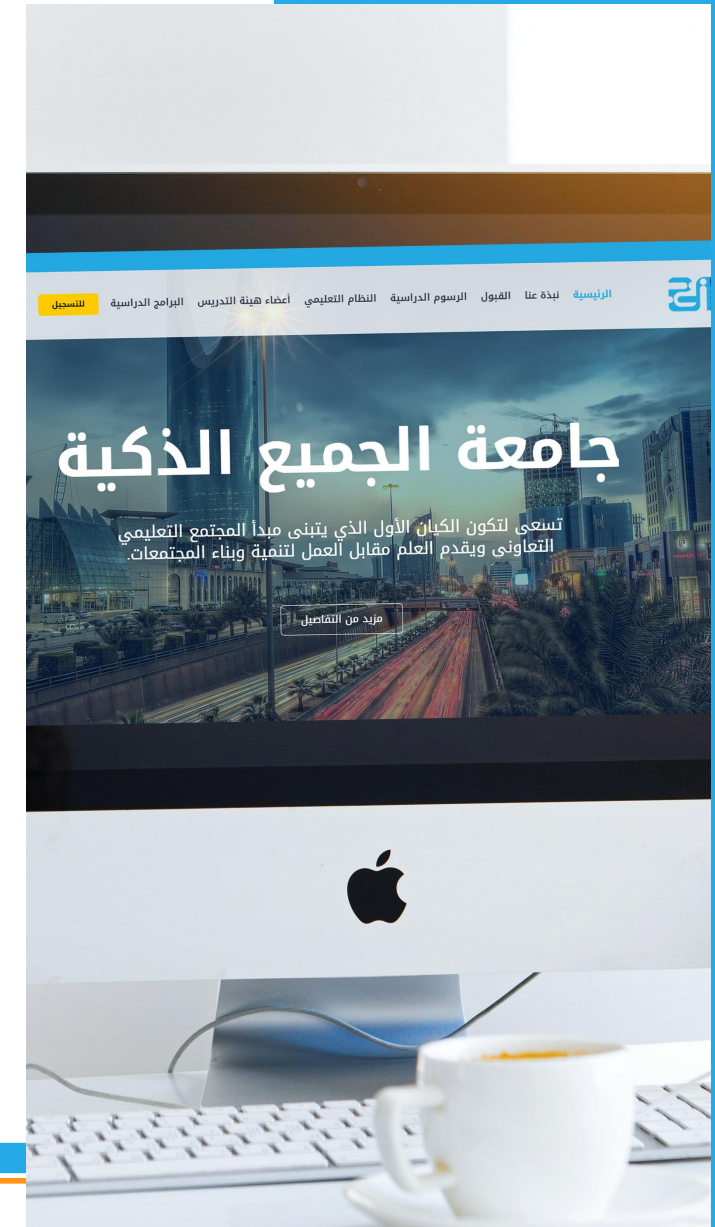


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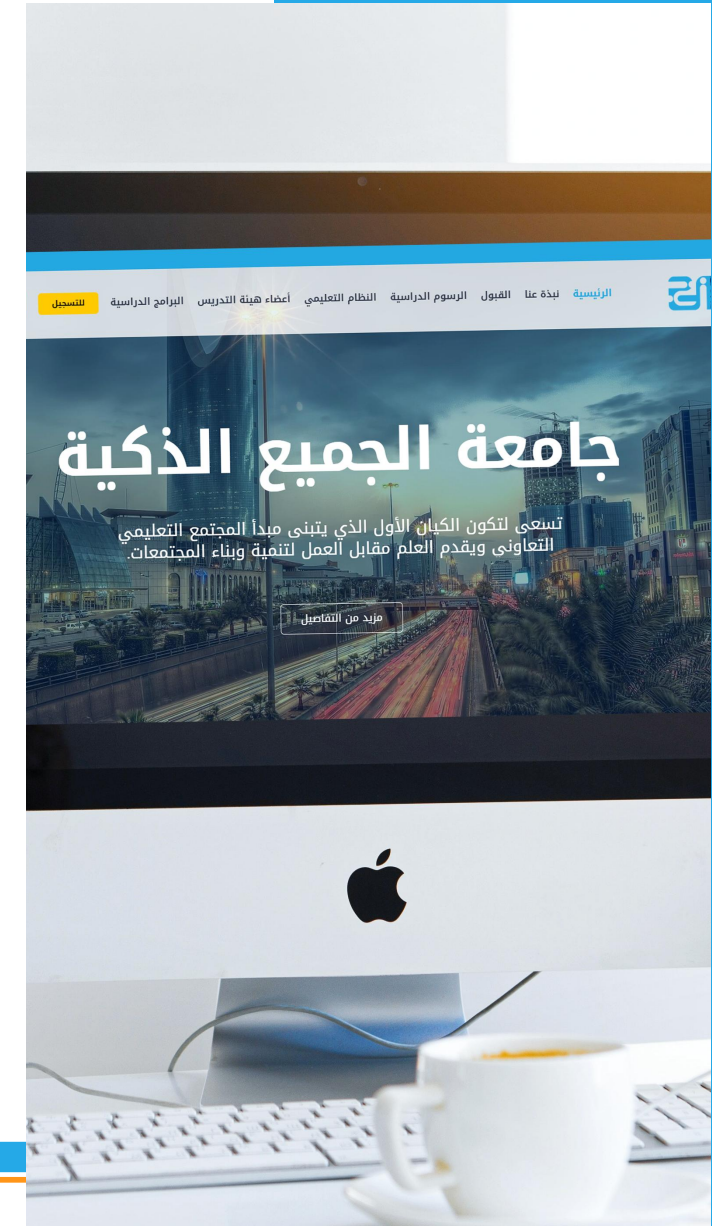
Lecture 1

General Introduction

«The future is
something that is built.
We don't suffer the
future, we make it»
Georges Bernanos



- **The Project Monitoring** course is the last module of the Project Cycle Management which is intended to assist students, leaders and managers to understand the processes, methods, approaches and tools for effective monitoring and evaluation of a project or program being implemented by their organizations/institutions.



By the end of this training course, the participants will be able to:

- Understand key elements of project monitoring and evaluation and its cycle within the project or program;
- Identify key functions of in project or program, system and framework as well as evaluation criteria;
- Distinguish between Monitoring and Evaluation;
- Identify the Key steps in setting Monitoring and Evaluation process;
- Adopt some methods and tools for effective project Monitoring & Evaluation.



Lecture 1

Contents of the Monitoring module

Introduction to monitoring

Norms, standards and management for monitoring and evaluation

Monitoring..?

Mehodologies and analysis for monitoring and evaluation

Evaluation





✓ Project Planning

&

✓ Project Management



1

General Introduction

2

Overview of Project Monitoring

3

The place of Project Monitoring & Evaluation in the Project Cycle Management?

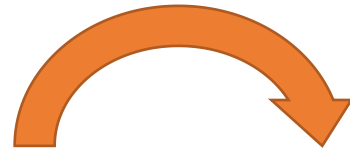
4

Monitoring & Evaluation System and Framework



Project-definition

Many people and organizations have defined what a project is,



‘A unique process, consisting of a set of co-ordinated and controlled activities with start and finish dates, undertaken to achieve an objectives conforming to specific requirements, including constraints of time, cost and resources.’



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Project Management & Planning



As stated in the definition, **a project** has a definite starting and finishing point and must meet certain specified objectives.

These objectives, must meet three fundamental criteria:

1. The project must be completed on time;
2. The project must be accomplished within the budgeted cost; and
3. The project must meet the prescribed quality requirements.



- Why does one need project management?
- What is the difference between project management and management of any other business or enterprise?
- Why has project management taken off so dramatically in the last 20 years?



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Project Management & Planning

Project Management

The planning, monitoring, and control of all aspects of a project and the motivation of all those involved in it, in order to achieve the project objectives within agreed criteria of time, cost, and performance.



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Project Management & Planning



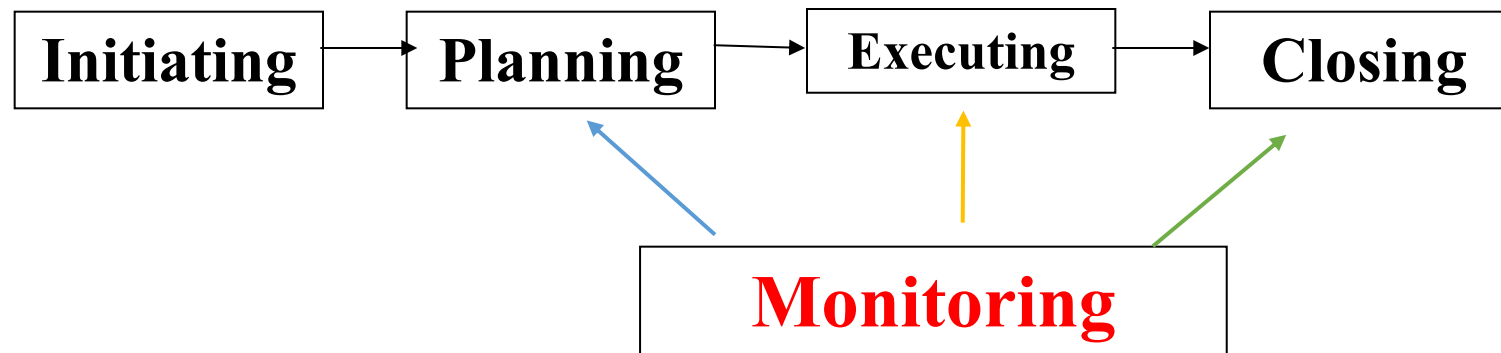
Project management is essentially **management of change**, it is *not applicable to running a factory making sausage pies, but it will be the right system when there is a requirement to relocate the factory, build an extension, or produce a different product requiring new machinery.*



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Project Management & Planning

Project life cycle (PMI)



Lecture 1

Project Management & Planning

Project Life Cycle & Organization

دورة حياة المشروع والمنظومة



Most, if not all, projects go through a life cycle that varies with the size and complexity of the project. On medium to large projects the life cycle will generally follow the following pattern:

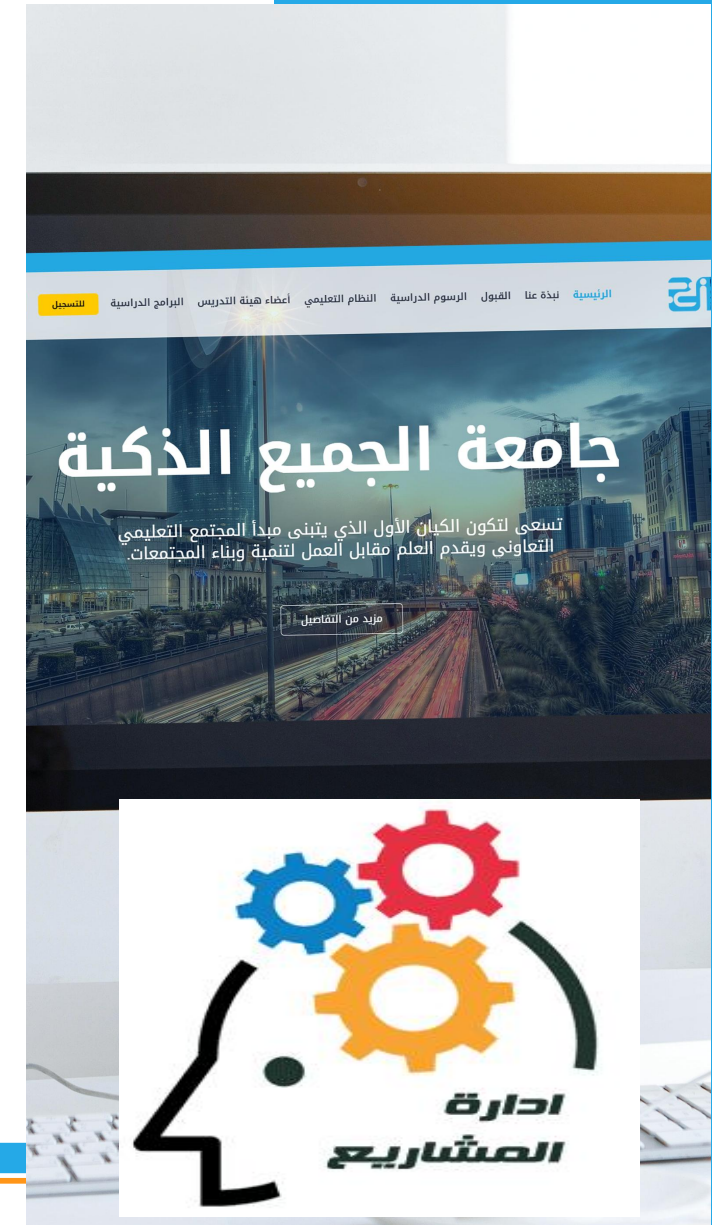
1. **Concept:** Basic ideas, business case, statement of requirements, scope;
2. **Feasibility:** Tests for technical, commercial, and financial viability, technical studies, investment appraisal, DCF, etc.;
3. **Evaluation:** Application for funds, stating risks, options, TCQ criteria;
4. **Authorization:** Approvals, permits, conditions, project strategy;
5. **Implementation:** Development design, procurement, fabrication, installation, commissioning;
6. **Completion:** Performance tests, handover to client, post-project appraisal;
7. **Operation:** Revenue earning period, production, maintenance;
8. **Termination:** Close-down, decommissioning, disposal.



small reminder...

The role of a project manager

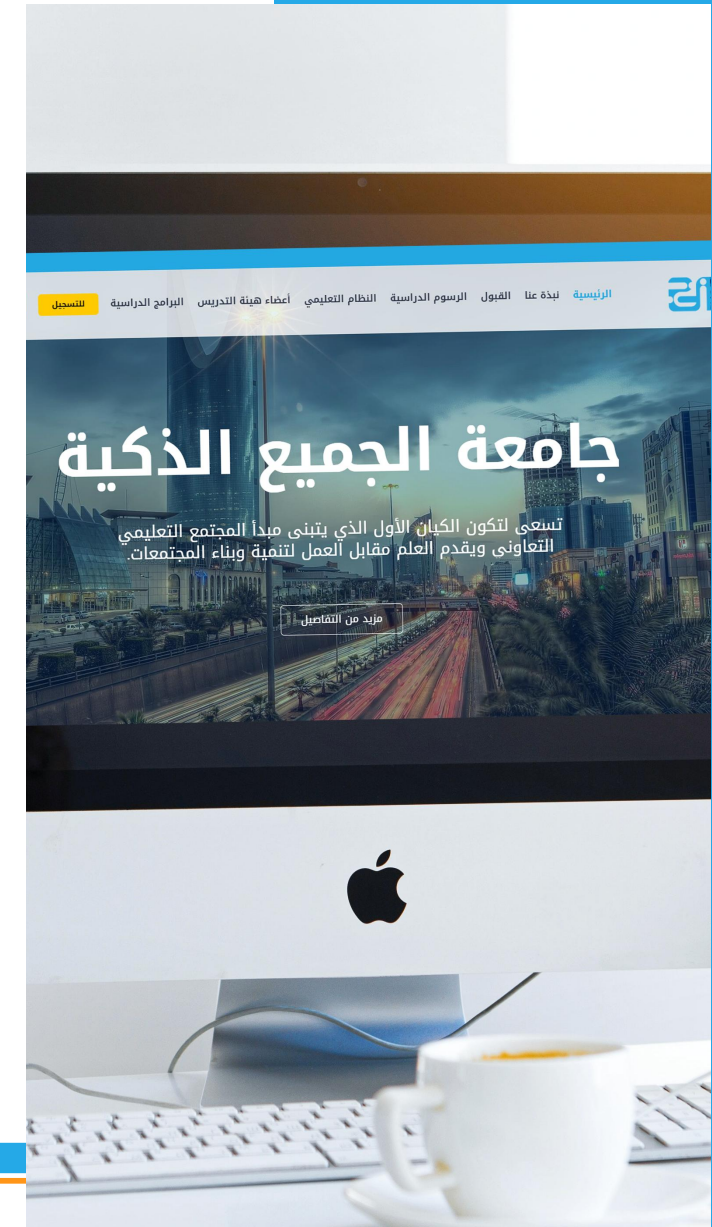
- Moves on to execute and oversee all activities to create deliverables as outlined in the work plan.
- Monitor the progress of the project and ensure that milestones and deliverables are on schedule.
 - Needs to take a step back and let your team execute the project plan.



small reminder...

The project monitoring phase

- is the fourth and most demanding phase of the project life cycle and the most demanding.
- The team performs **all planned activities, builds the deliverables** and presents them to the project stakeholders.

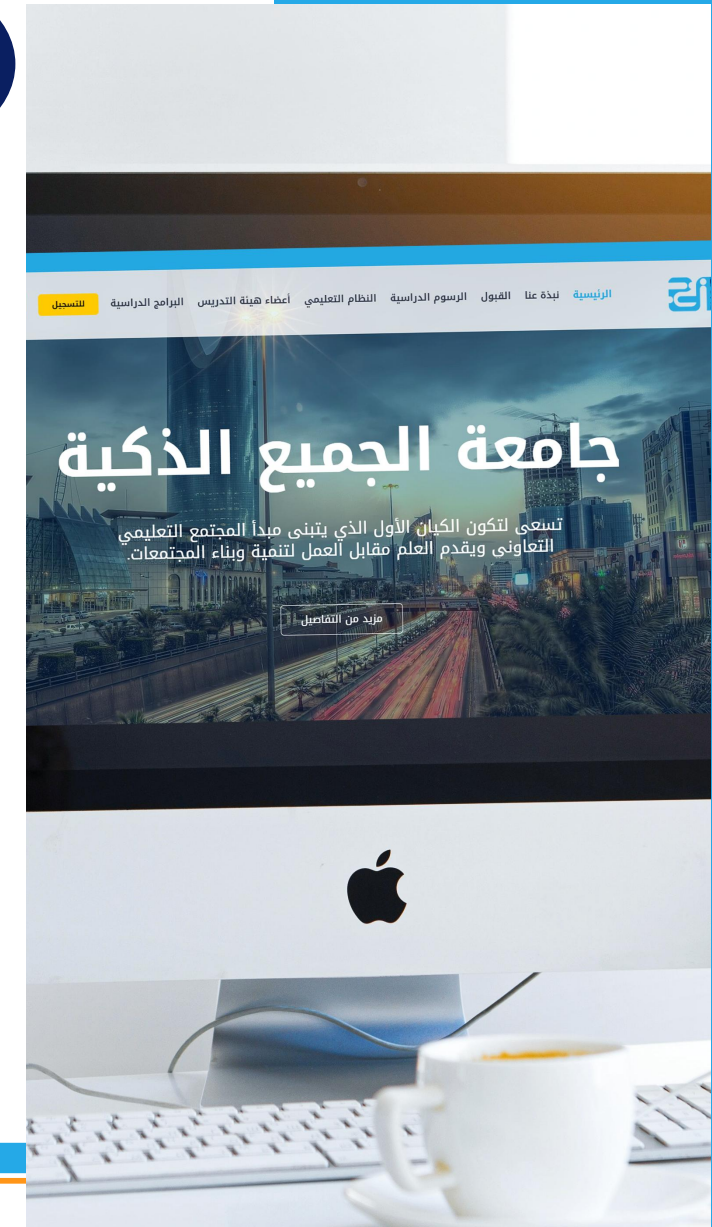


2.1. What is monitoring ?

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

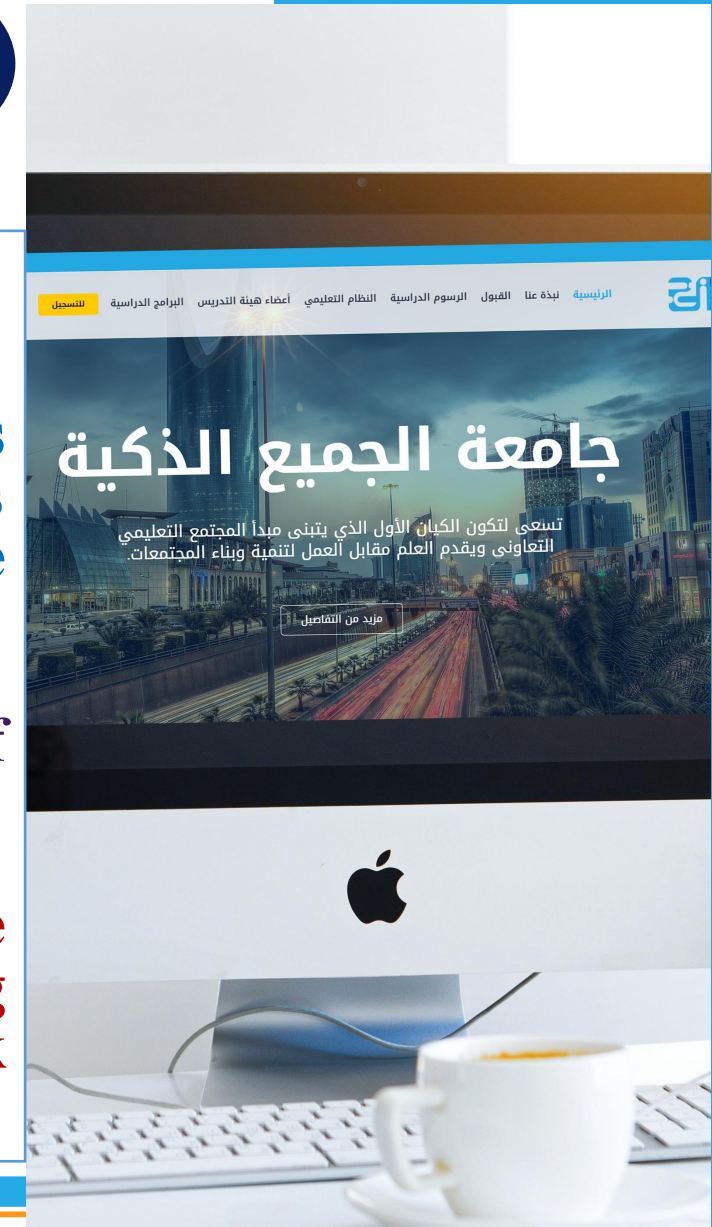


- ❖ It is a process that helps improve performance and achieve results of the project. Its goal is to improve current and future management of outputs, outcomes and impact.



“Monitoring” definitions

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



Lecture 1

Overview of Project Monitoring

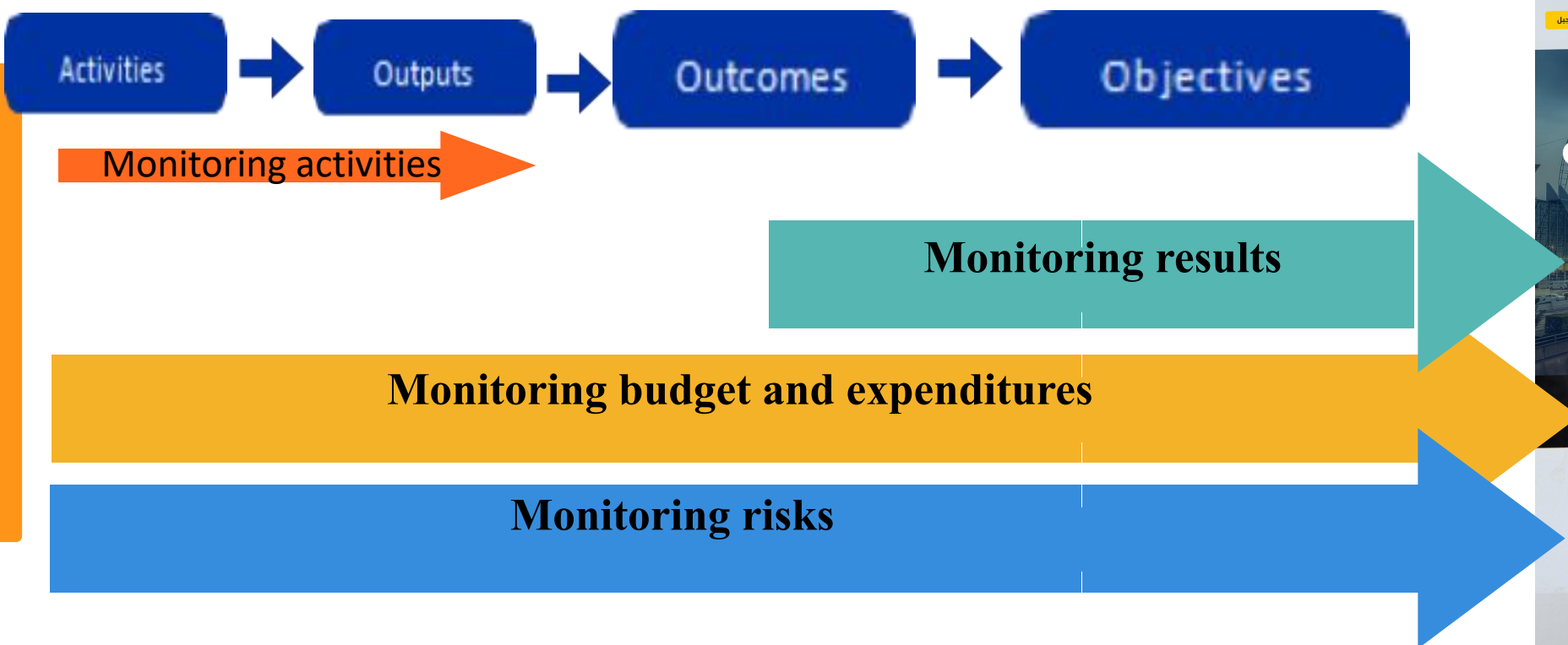


Figure 1. Four key monitoring areas

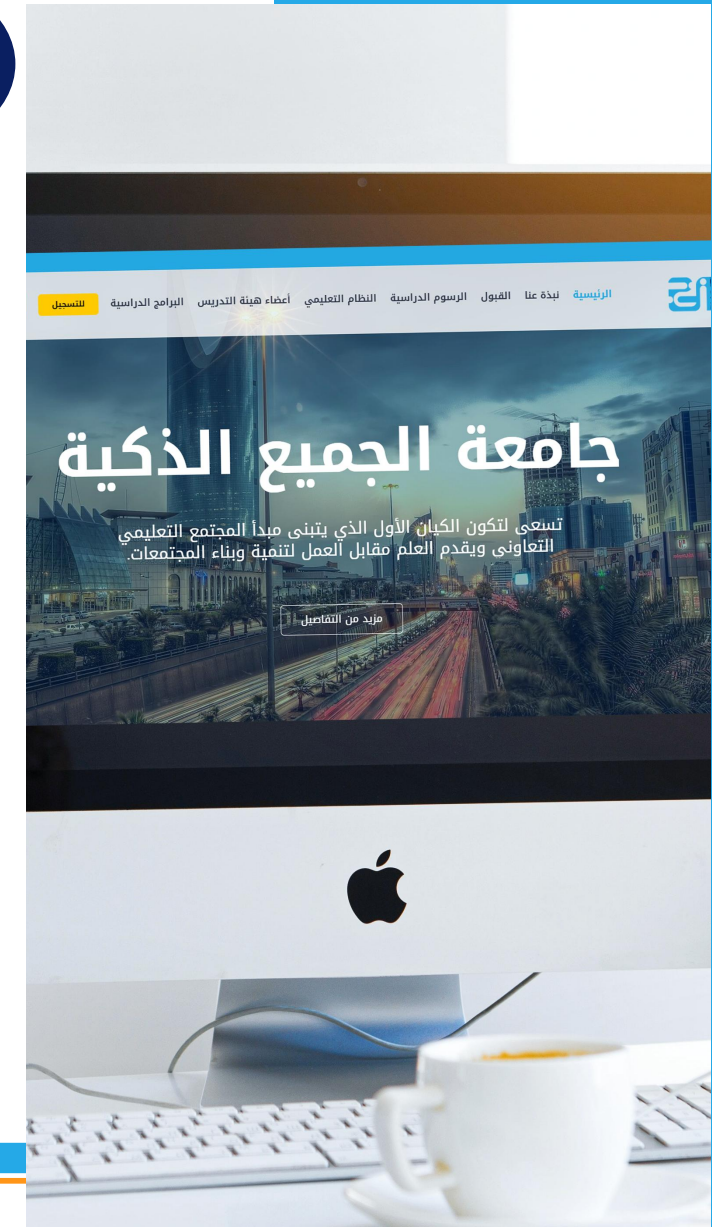


2.2. When to monitor?

Monitoring is undertaken on an ongoing basis during the implementation of an intervention. Where possible, it is essential to ask relevant “monitoring questions” regularly.



Figure 2.1. Results-based management life cycle



2.3. Why monitoring?

Monitoring aims to answer the following questions:

While implementing activities:

When measuring results:



Are results being achieved?

What activities are being implemented?

Is progress shown against indicators?

Are they being implemented as planned?

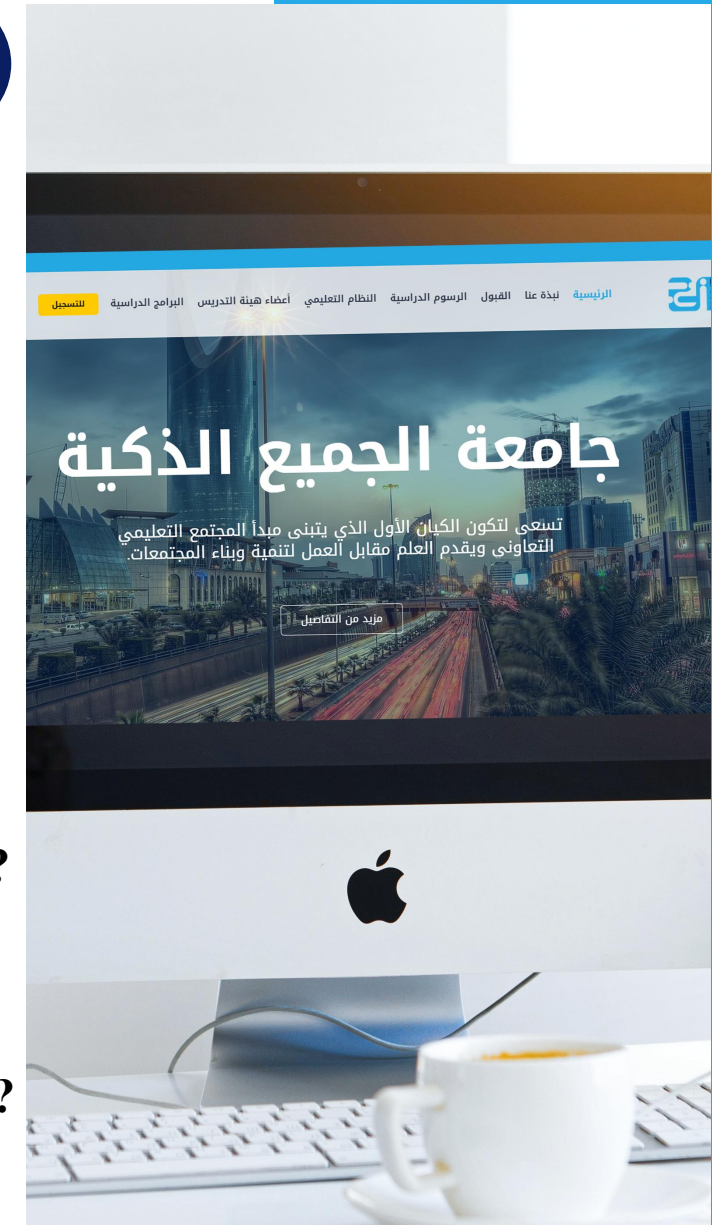
Are targets being met?

What is the current budget burn rate?

Are target groups satisfied with the services?

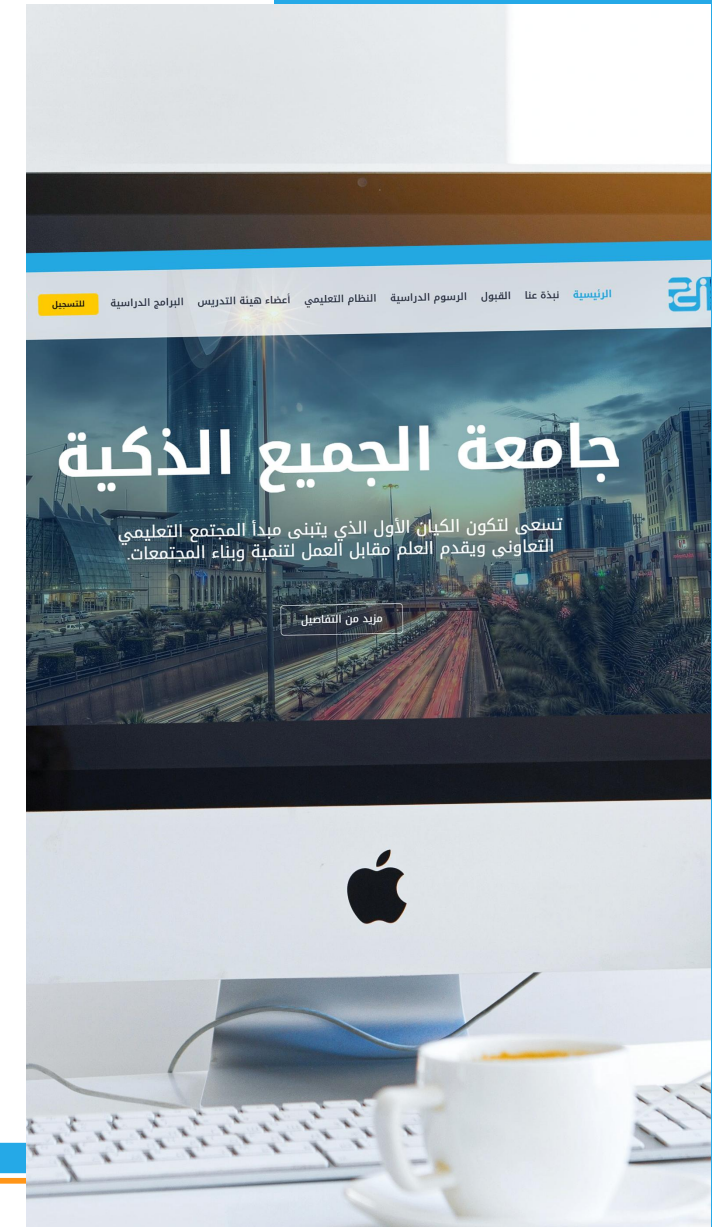
Have any new risks been identified?

Are intended target groups being reached?



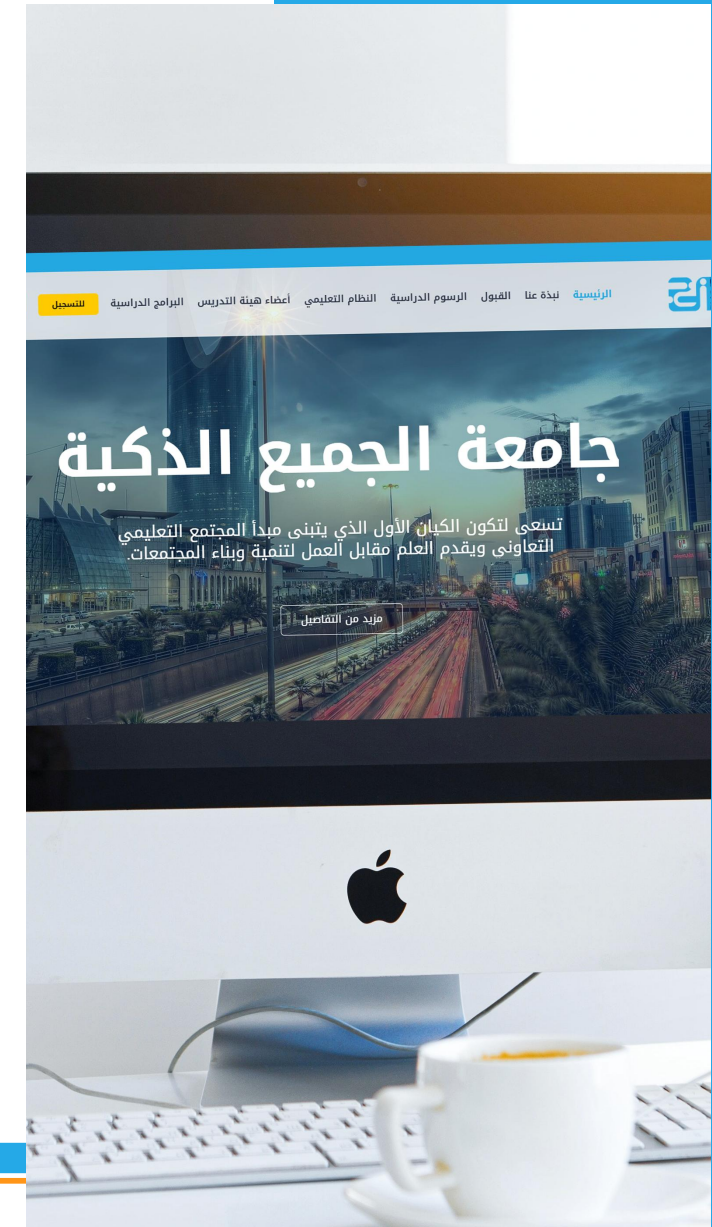
3.1. Monitoring versus evaluation

- **Monitoring** is ongoing and tends to focus on what is happening. Monitoring data is typically used by managers for ongoing project implementation, tracking outputs, budgets, compliance with procedures, etc.
- **Evaluation** is a process of assessing whether the project has achieved its intended objectives.



3.1. Monitoring versus evaluation

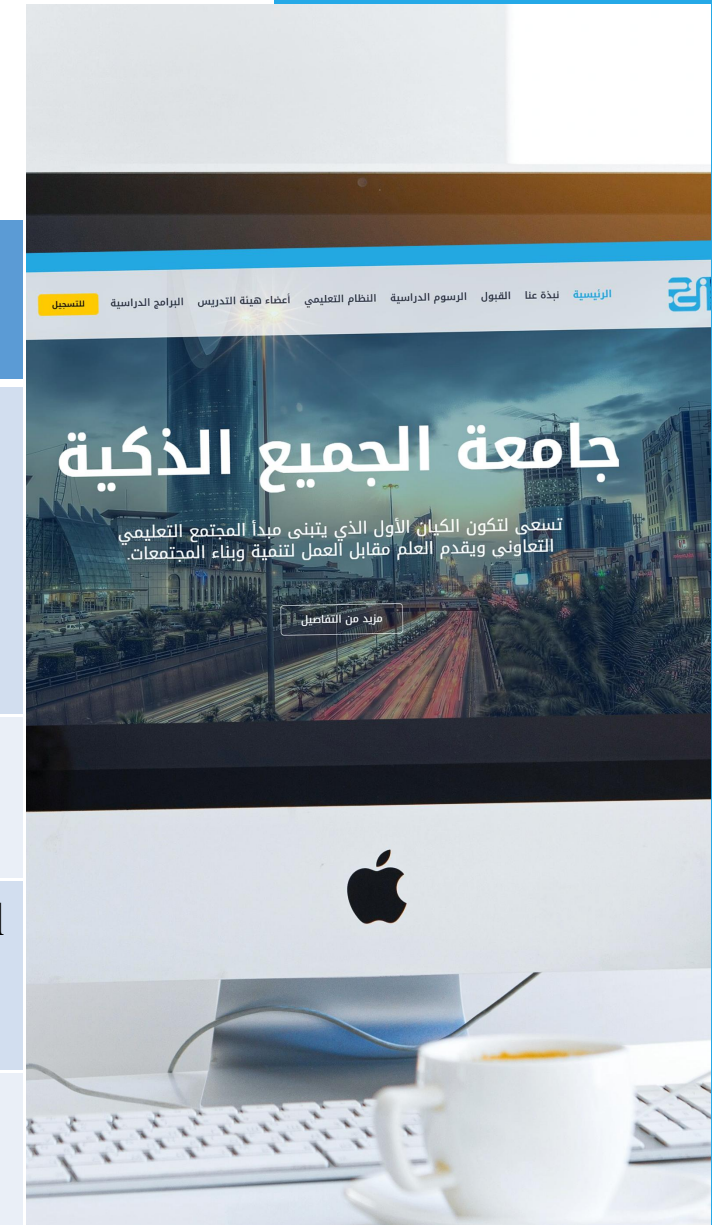
By drawing conclusions, evaluation intends to provide recommendations for the improvement on the future course of the project as well as lessons learned for other projects. Some big organizations use specific criteria when they do evaluation. Often, the **main criteria assessed are efficiency, effectiveness and impact**. Also, **relevance and sustainability** are usually included.



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The place of Project Monitoring & Evaluation in the Project Cycle Management?

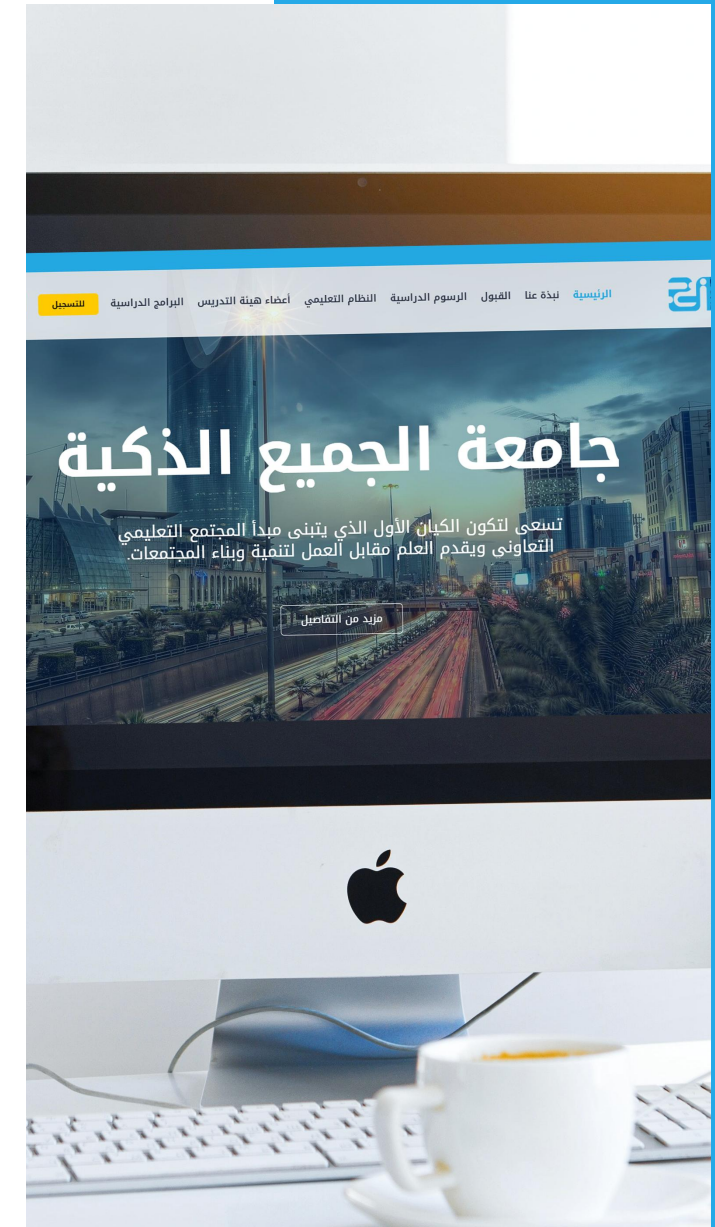
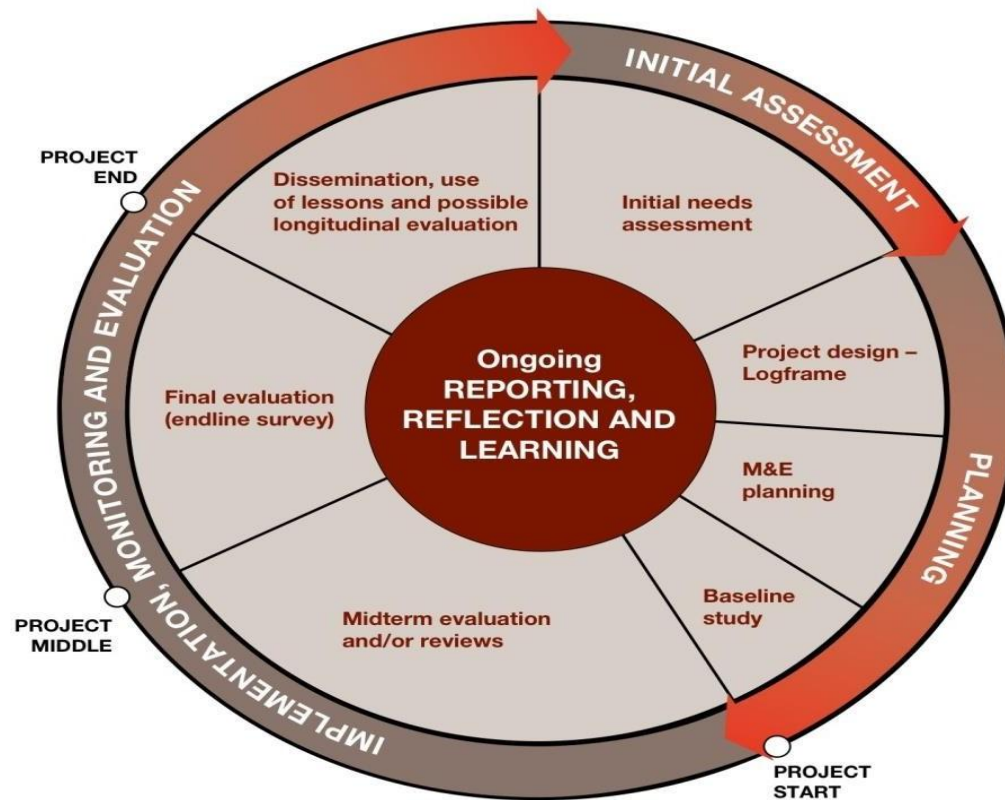
	Monitoring	Evaluation
Why?	- Check progress -Inform decisions and remedial action, -Update project plans, -Support accountability	-Assess progress and worth, -Identify lessons and recommendations for longer-term planning and organizational learning; -Provides accountability
When?	Ongoing during project/program	Periodic and after project/program
Who?	Internal, involving project/program implementers	Can be internal or external to organization
Link to logical hierarchy	Focus on inputs, activities, outputs and shorter-term outcomes	Focus on outcomes and overall goal



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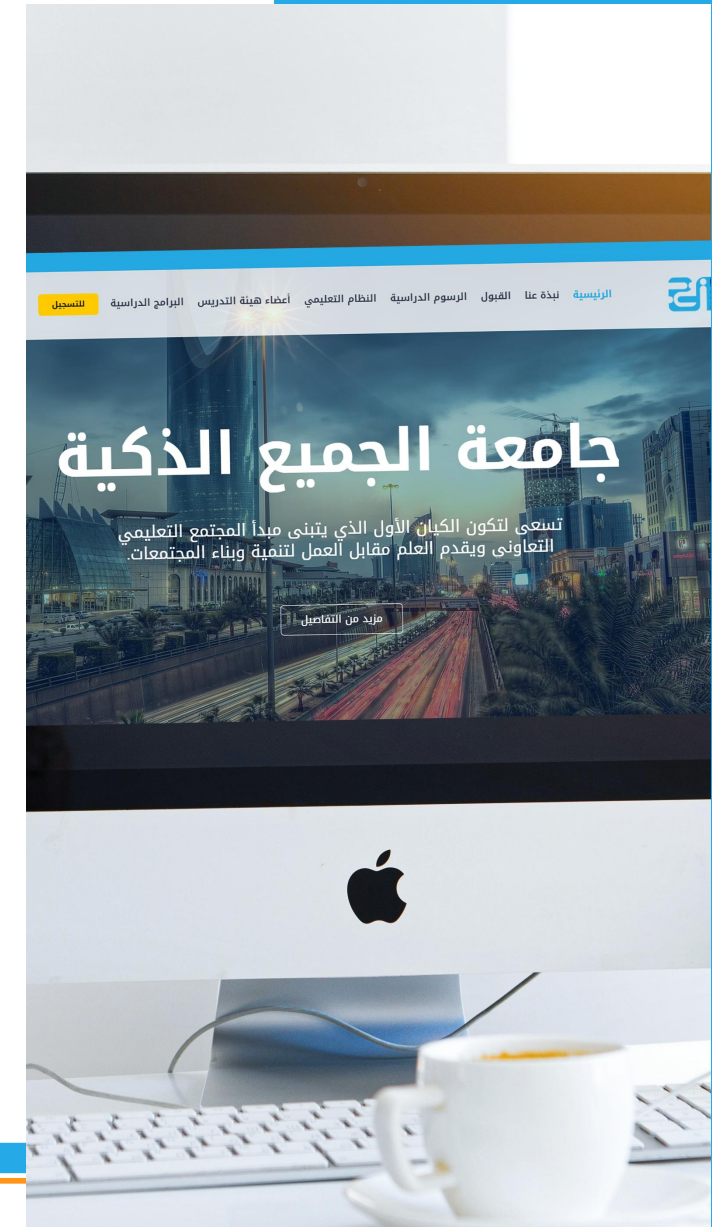
3.2.M&E in Project Cycle Management





3.3 The importance of M&E in the project management

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



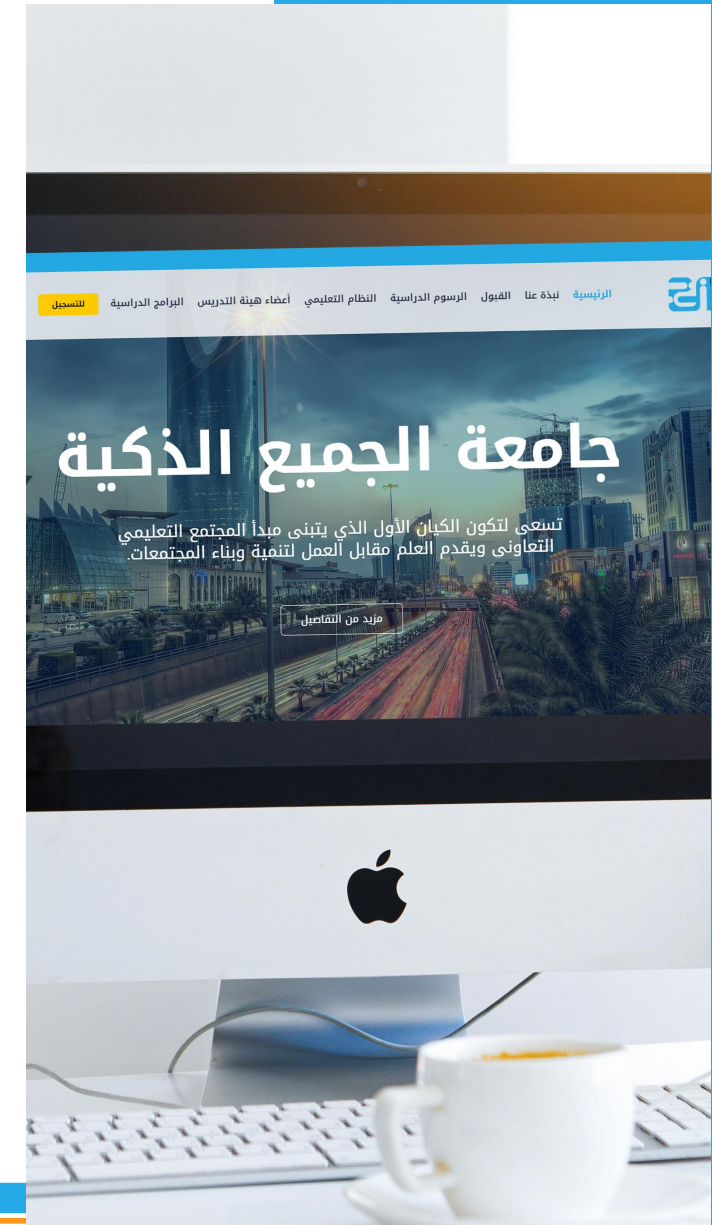
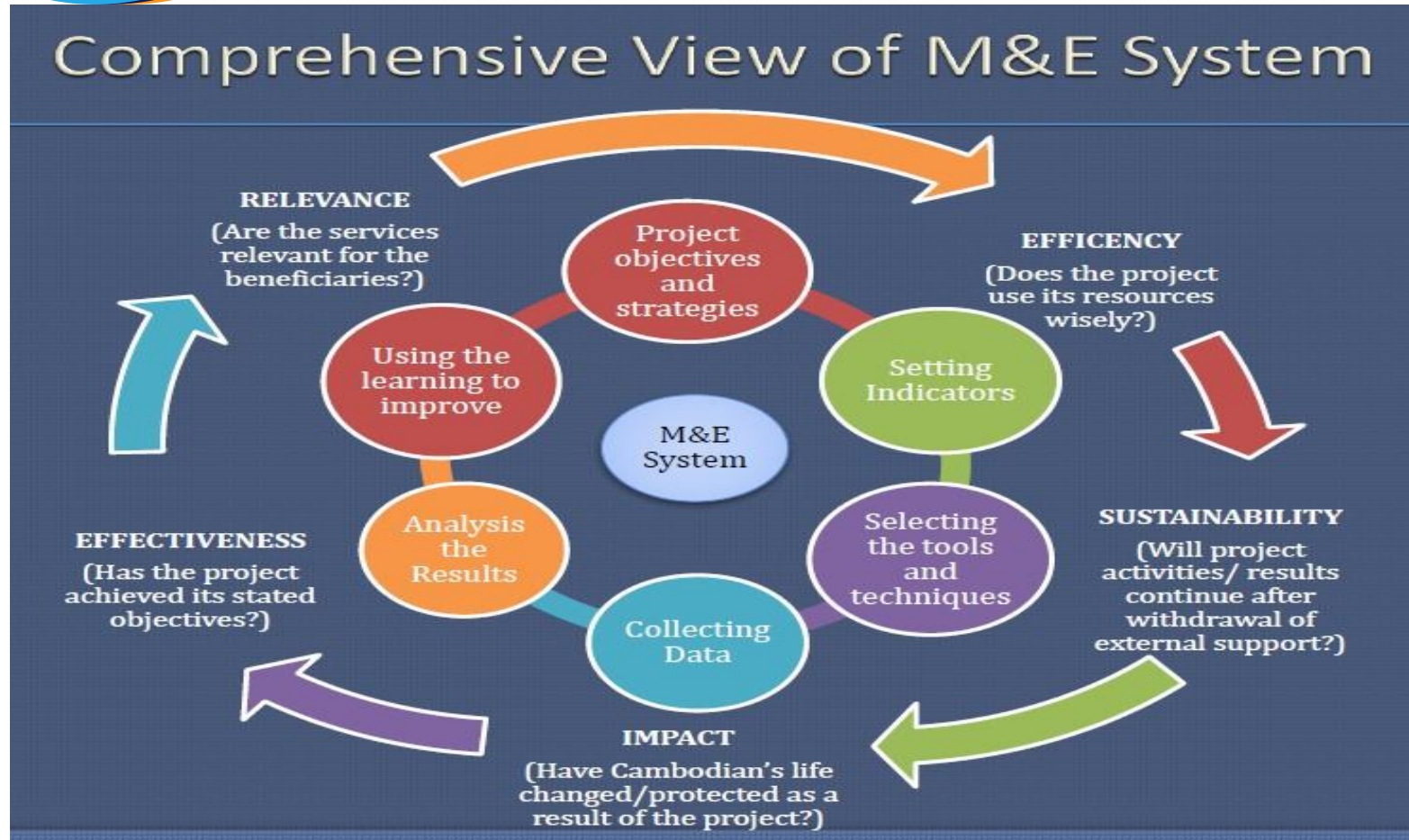
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The place of Project Monitoring & Evaluation in the Project Cycle Management?



Lecture 1

M&E System and Framework?

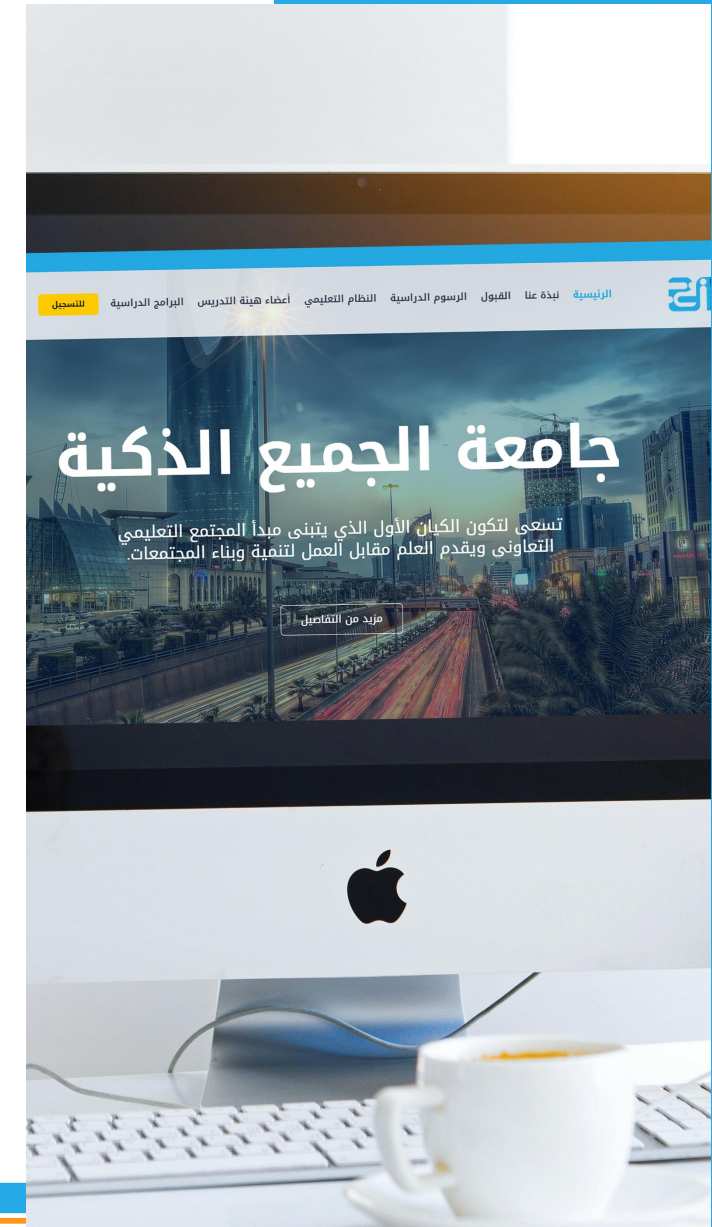


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M&E System and Framework?

➤ Inner cycle is about Monitoring involves
6 steps

- 1) Identify Project Objectives and Strategies
- 2) Setting Indicators
- 3) Selecting the Tools and Techniques:
- 4) Collecting Data
- 5) Analyze the Results
- 6) Use the Learning to Improve

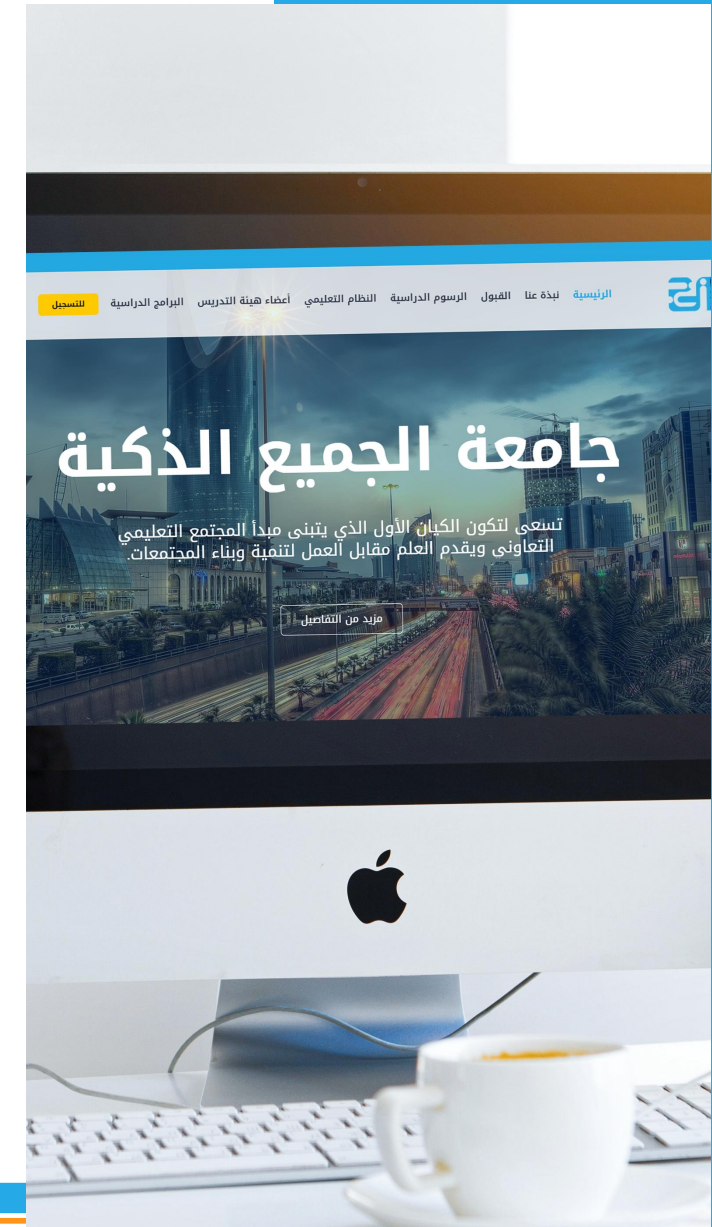


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M&E System and Framework?

- Outer cycle is about Evaluation involves
5 key criteria

- 1) **Relevance**
- 2) **Effectiveness**
- 3) **Efficiency**
- 4) **Sustainability**
- 5) **Impact**

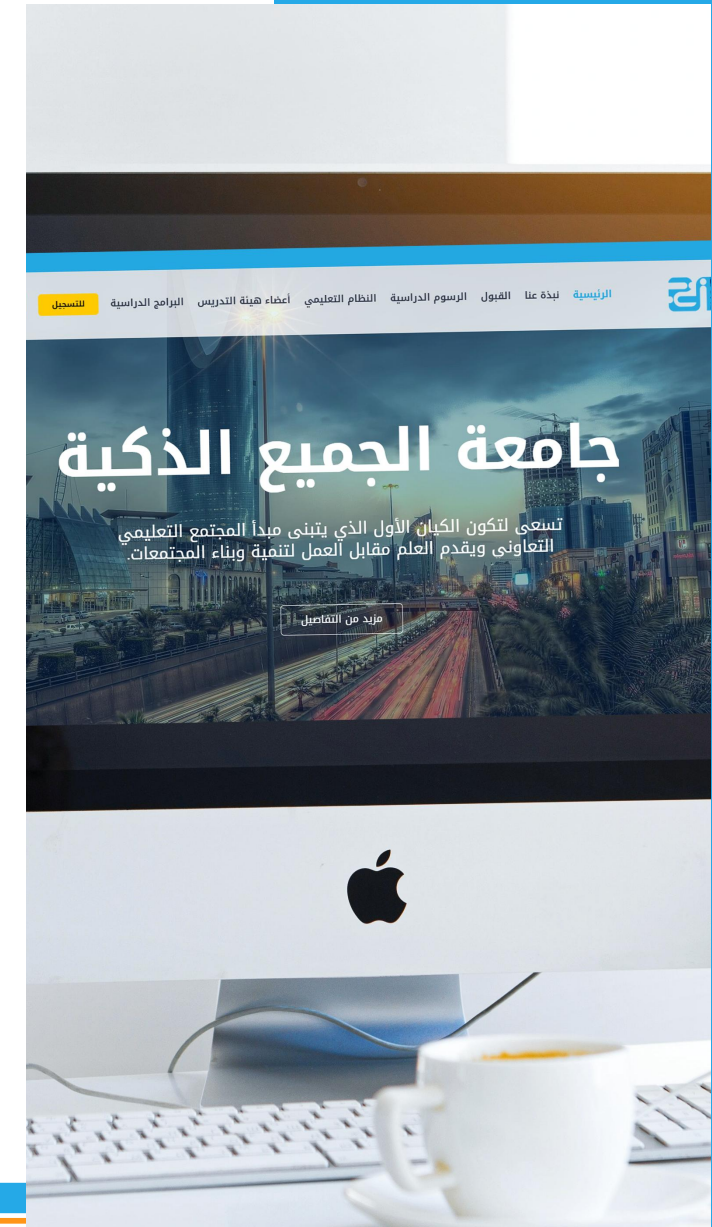


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M&E System and Framework?

➤ Outer cycle is about Evaluation involves

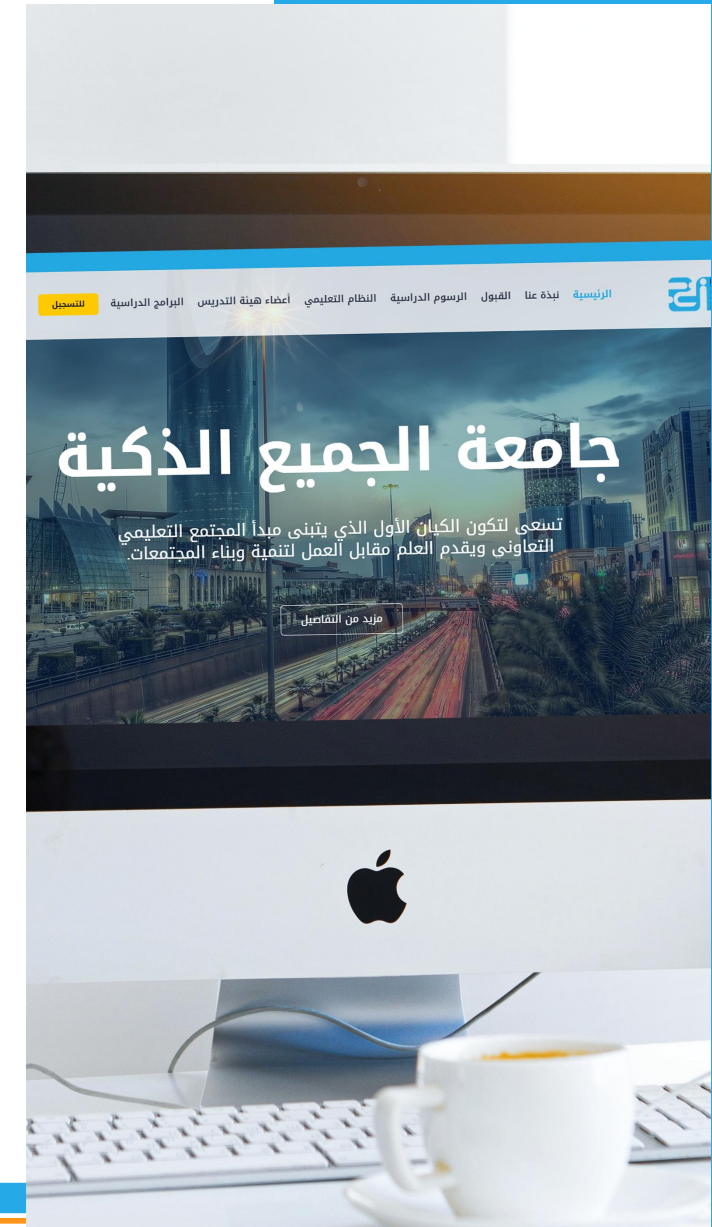
To assess or evaluate the project or program, the evaluator/ evaluation team will use different tools and techniques for data collection, interview and focus group discussion and self-assessment forms. Some support documents such as financial reports could be also helpful to verify the use of funds (expenses)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



4.1.Elements of a good M&E system

5 elements of good system

- 1) A capable Monitoring and Evaluation staff unit
- 2) Clear goals and objectives of the project
- 3) A core set of indicators and targets
- 4) A plan for data collection and analysis
- 5) A plan for data dissemination

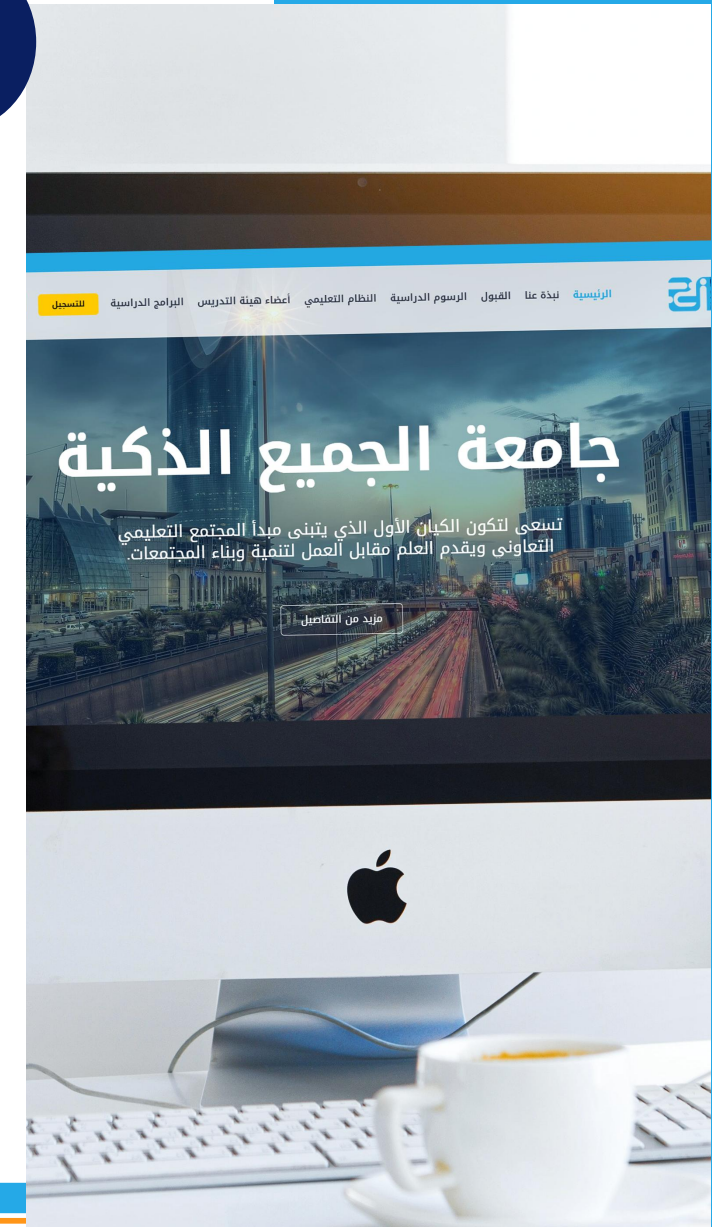


4.2. Tasks in Monitoring and Evaluation

Tasks in M&E: 6 tasks

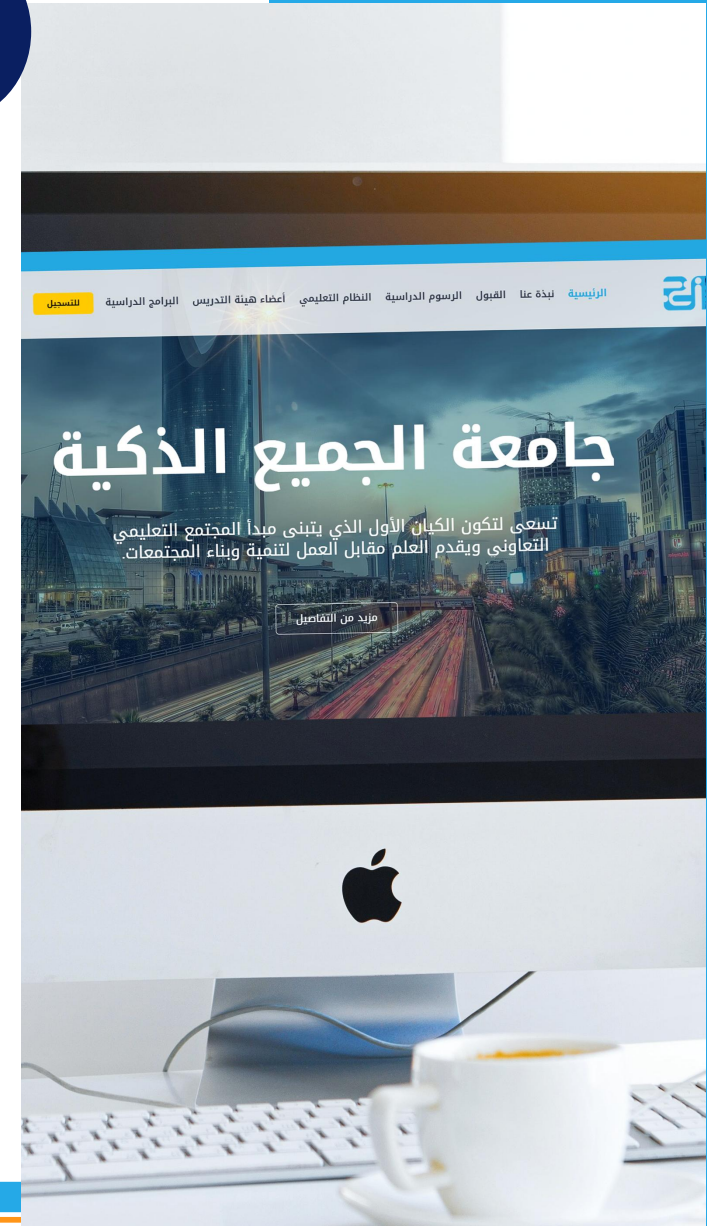
Task 1: Early Design Phase (Formulation & Approval)

- 1) Setting scope & purpose
- 2) Setting key performance questions, indicators and mechanisms
- 3) Identify organizational arrangement for M&E
- 4) Indicative M&E budget
- 5) Document the above as M&E framework



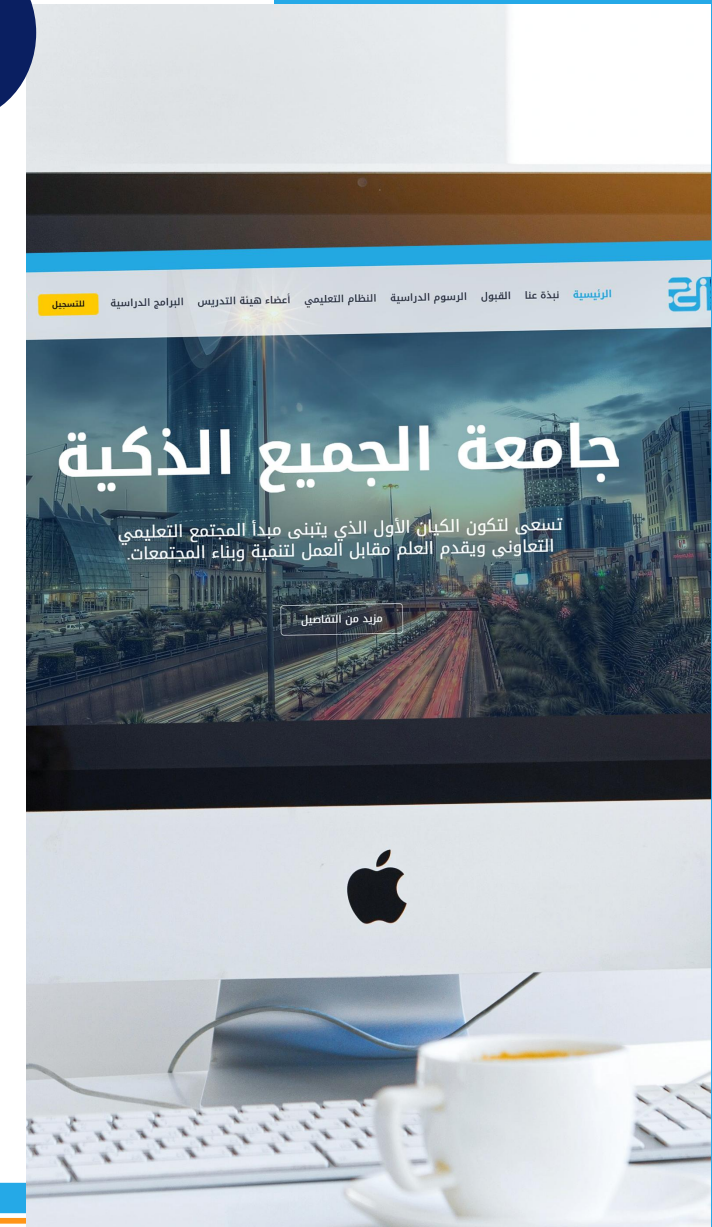
Task 2: Start-up prior to project funding (with special operating fund)

- 6) Review the key performance questions, indicators, monitoring mechanisms, and project strategy
- 7) Initiate baseline study
- 8) Train few potential staff on M&E
- 9) Prepare Project Implementation Plan (PIP) with few key staff



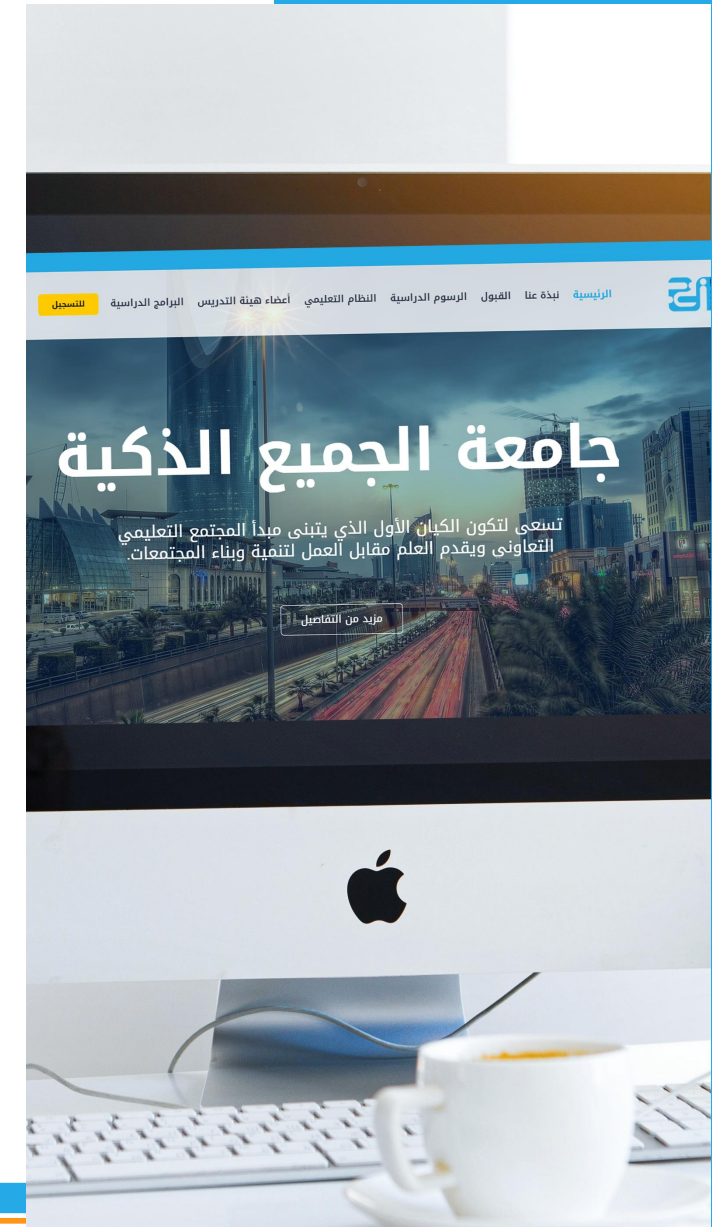
Task 3: Start up after project funding

- 10) Review project design in relation to M&E with the key stakeholders
- 11) Prepare detailed M&E Plan according to the partnership arrangements
- 12) Put in place required manpower, capacity and conditions for M&E implementation



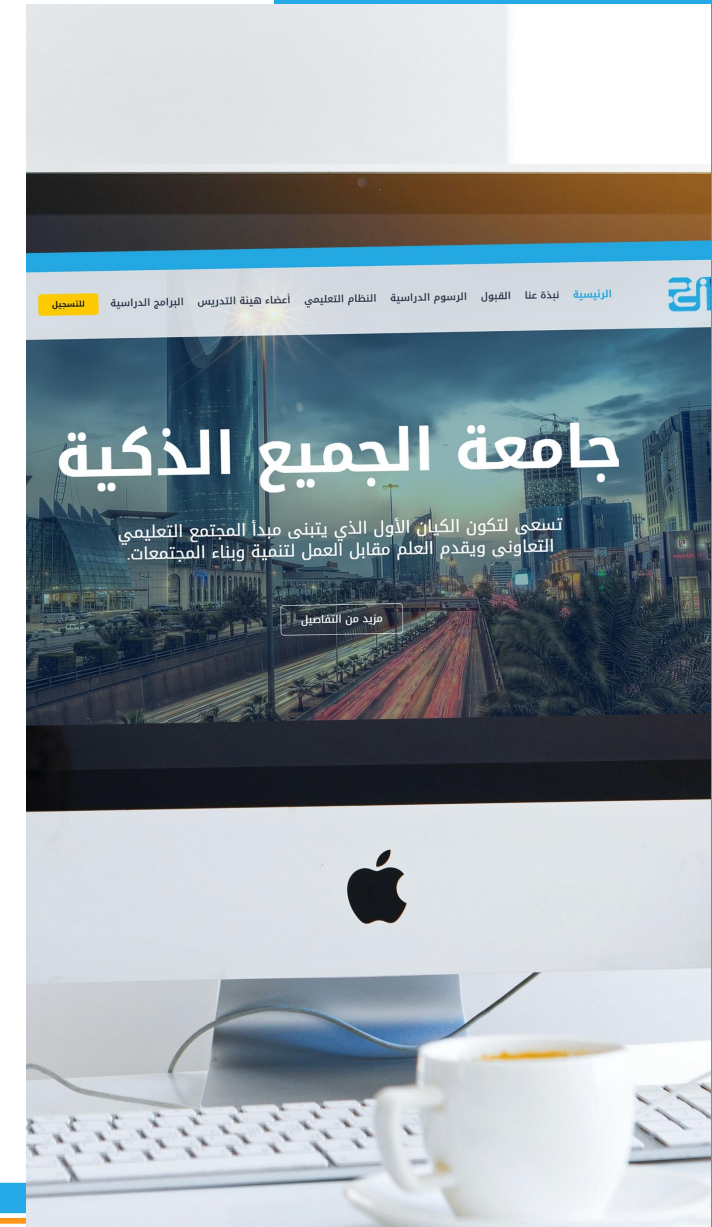
Task 4: During project implementation

- 13) Ensure management has required information
- 14) Facilitate regular review meetings/communication with implementers
- 15) Prepare annual reviews and support supervision missions
- 16) Conduct focus studies or emergency issue
- 17) Communicate results to the stakeholders



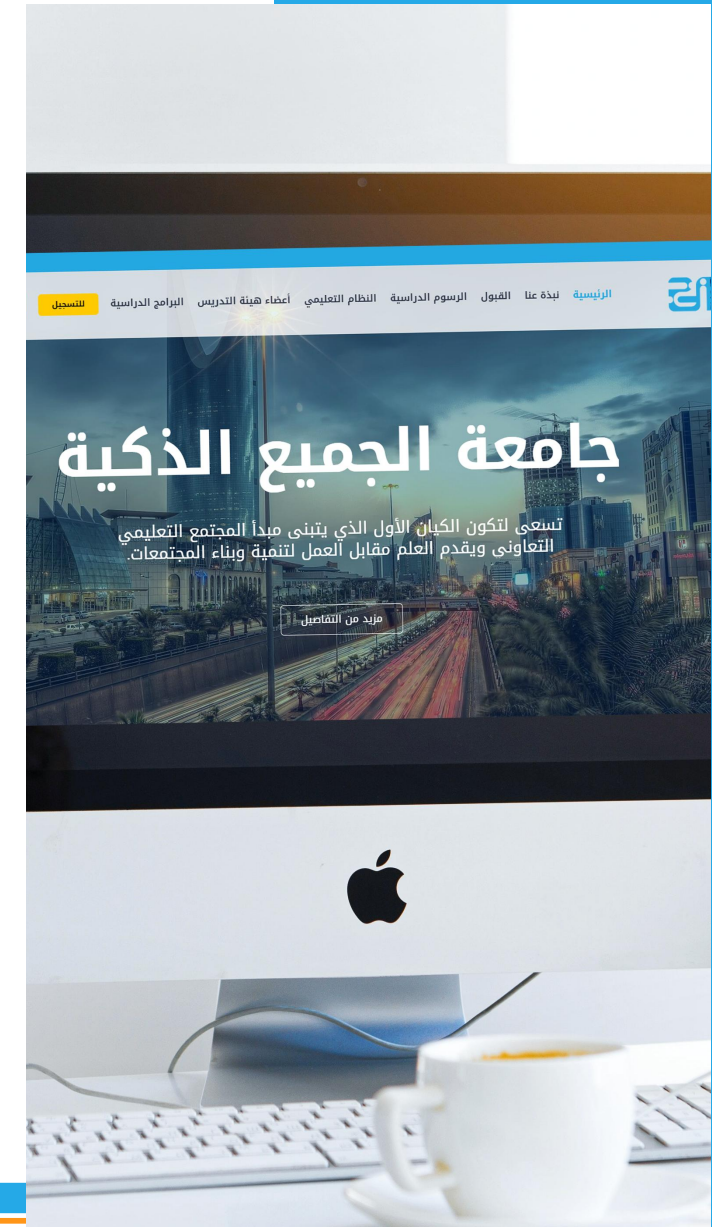
Task 5: Midterm Review (MTR) or Evaluation

- 18) Facilitate MTR or evaluation internal or external process
- 19) Assist in response to the MTR or evaluation feedback
- 20) Assist in project plan/ design review as per MTR or evaluation recommendations
- 21) Adjust the M&E system if needed



Task 6: Project phase-out or completion

- 22) Conduct end-of-project evaluation and/or impact study
- 23) Find out how the impacts will be sustained
- 24) Hold workshop and do field studies
- 25) Articulate lessons learned for the next phase or other projects



4.3 Key steps in setting Monitoring and Evaluation system

Identify/ establish
purpose and scope

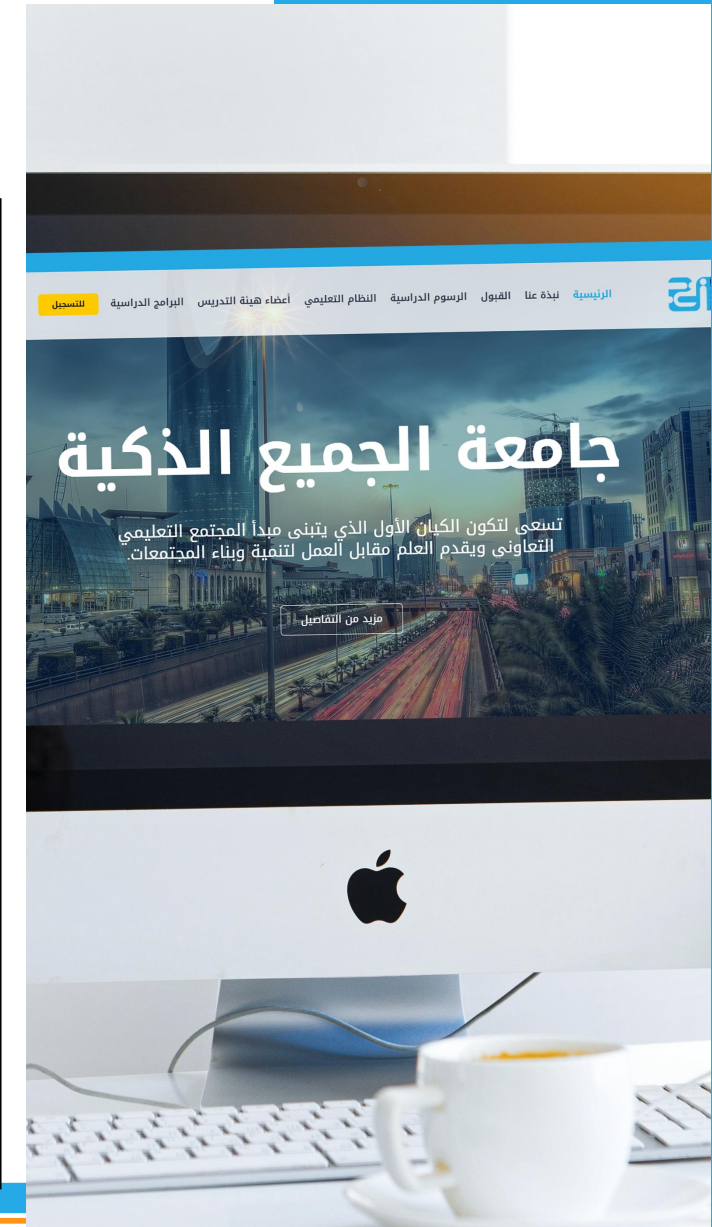
Specify information
needed and indicators

Planning information
gathering and organization

Planning critical
reflection process and
events

Planning for quality
communication and
reporting

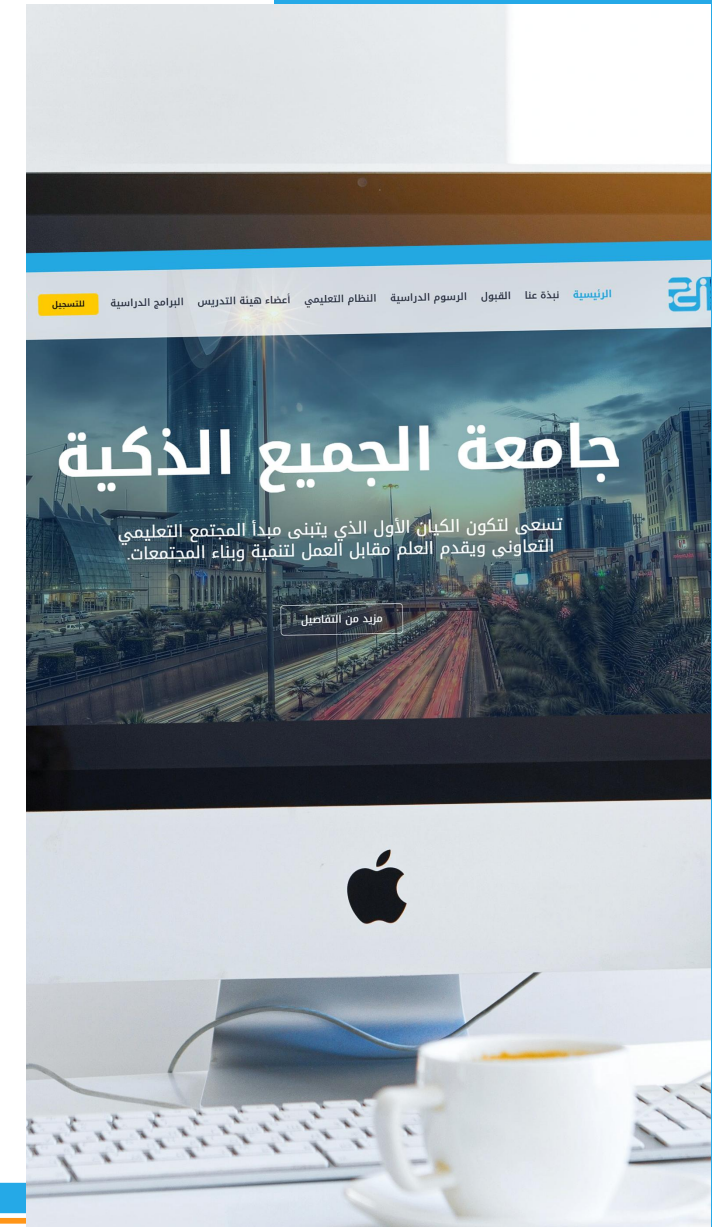
Planning for
conditions and
capacities



4.4 Key Criterion for Monitoring and Evaluation

Each development organization typically uses its own definition for the criteria. 5 key evaluation criteria are identified:

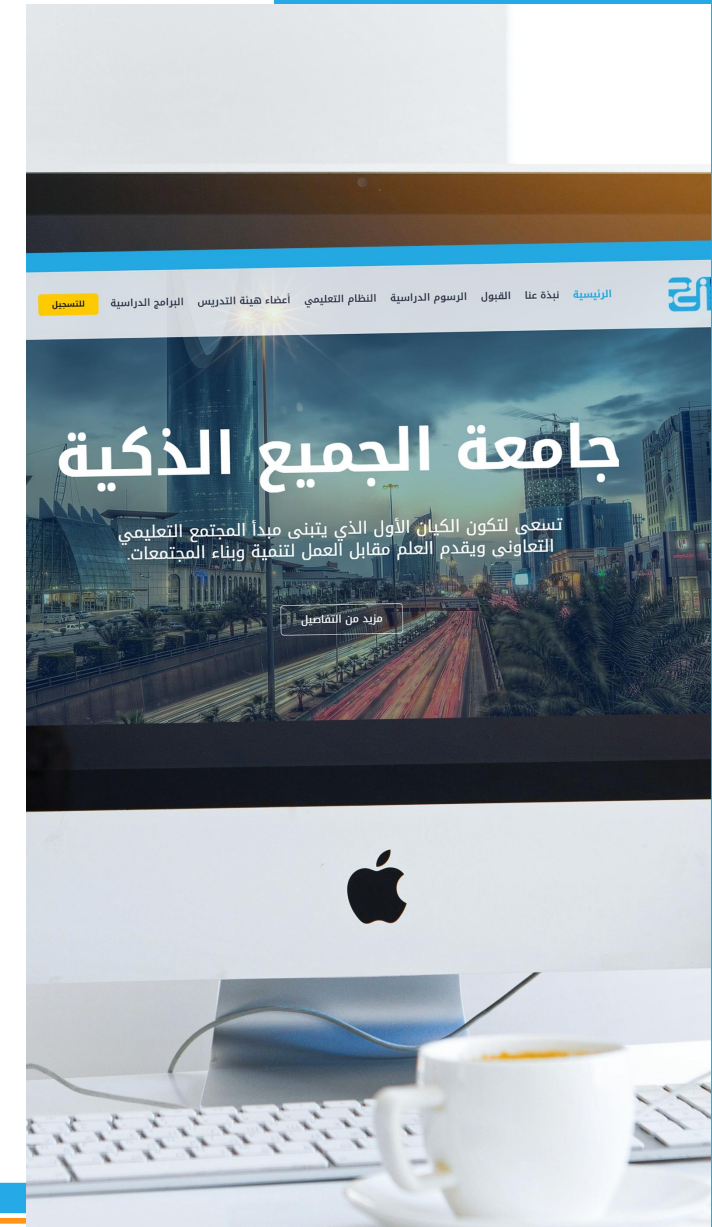
- 1) Relevance
- 2) Effectiveness
- 3) Efficiency
- 4) Impact
- 5) Sustainability



4.5. Planning and Steps for Project Monitoring and Evaluation system

➤ A.Steps in Project Monitoring (6 main steps)

- **Step 1: Identify Project Objectives and Strategies:**
Specify the Intervention (Goals, Objectives, Activities/Process, Inputs, Outcomes, and Impacts)
- **Step 2: Setting Indicators:**
Needs of Information, Performance Monitoring and SMART4 Indicators



Lecture 1

M&E System and Framework?

- **Step 3: Selecting the Tools and Techniques:**

Select strategy for M&E Data collection in different methods from existing and new sources.

- **Step 4: Collecting Data:**

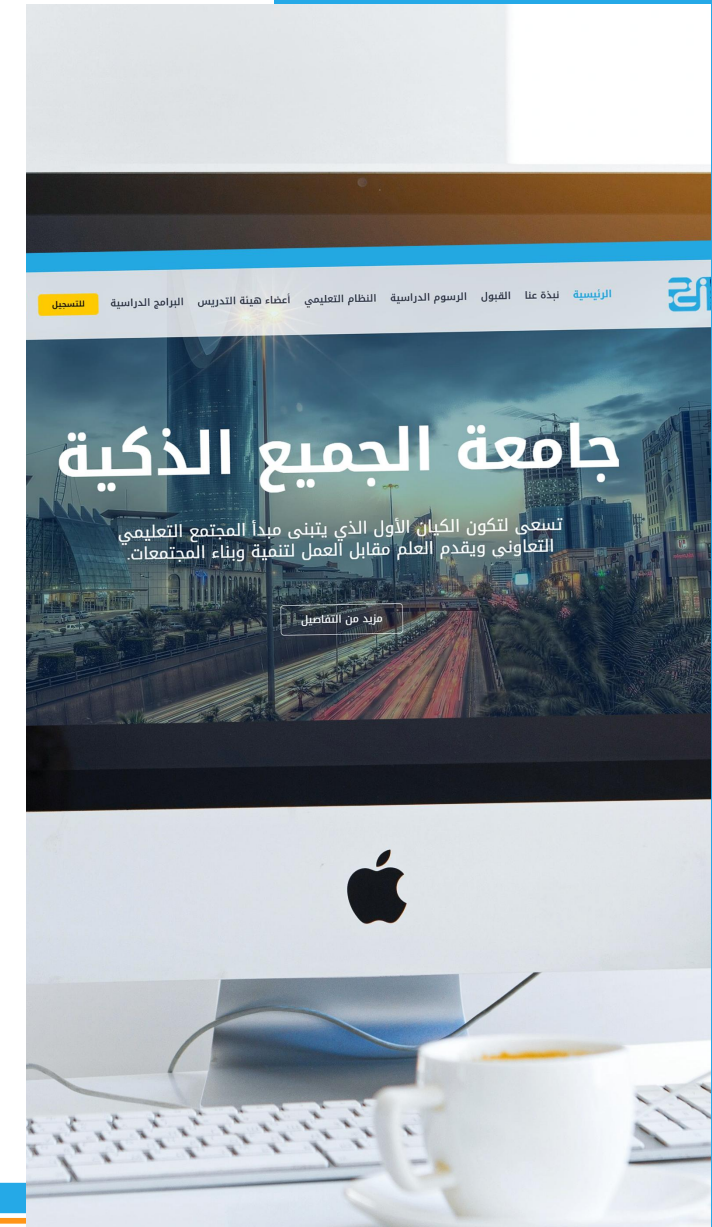
Set baseline and realistic Targets for Objectively Verifiable Indicators (OVI) of performance

- **Step 5: Analyse the Results:**

Design and Implement Monitoring tools/system (manual and computerized)

- **Step 6: Use the Learning to Improve:**

Use of monitoring data in project Evaluation, Planning, Management and Reporting.



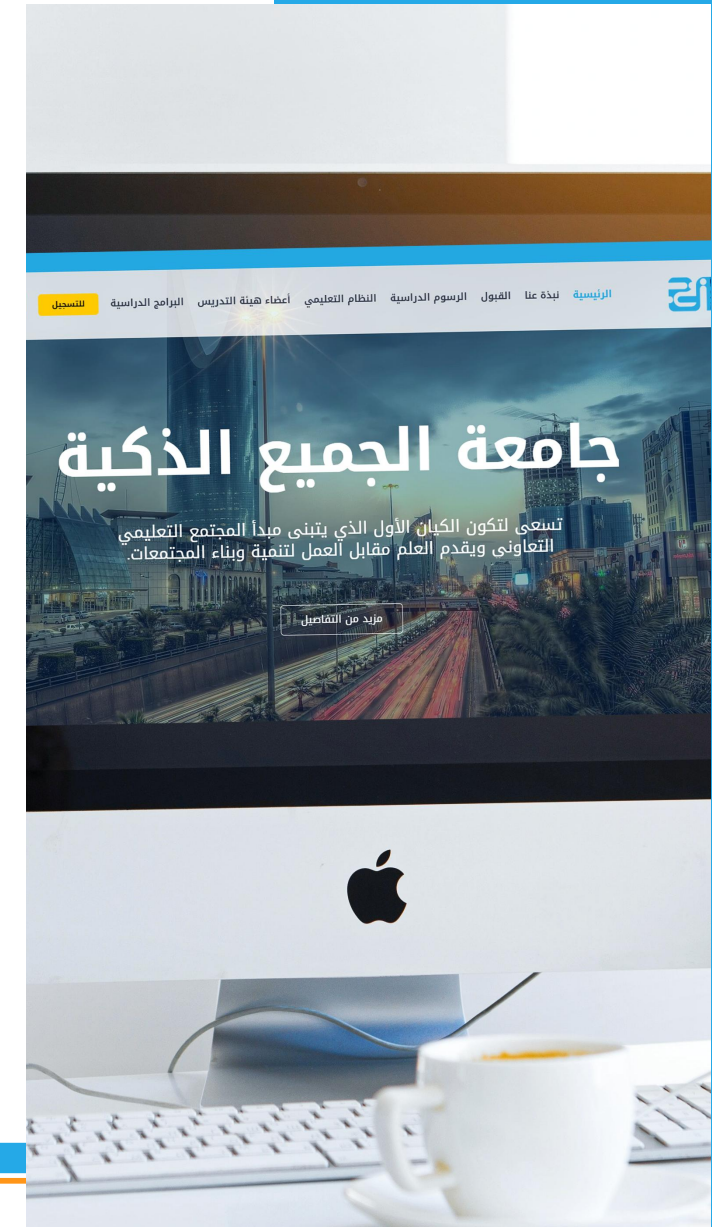
➤ B. Steps in Project Evaluation (5 main steps)

▪ Step1: Implementing M&E Plan:

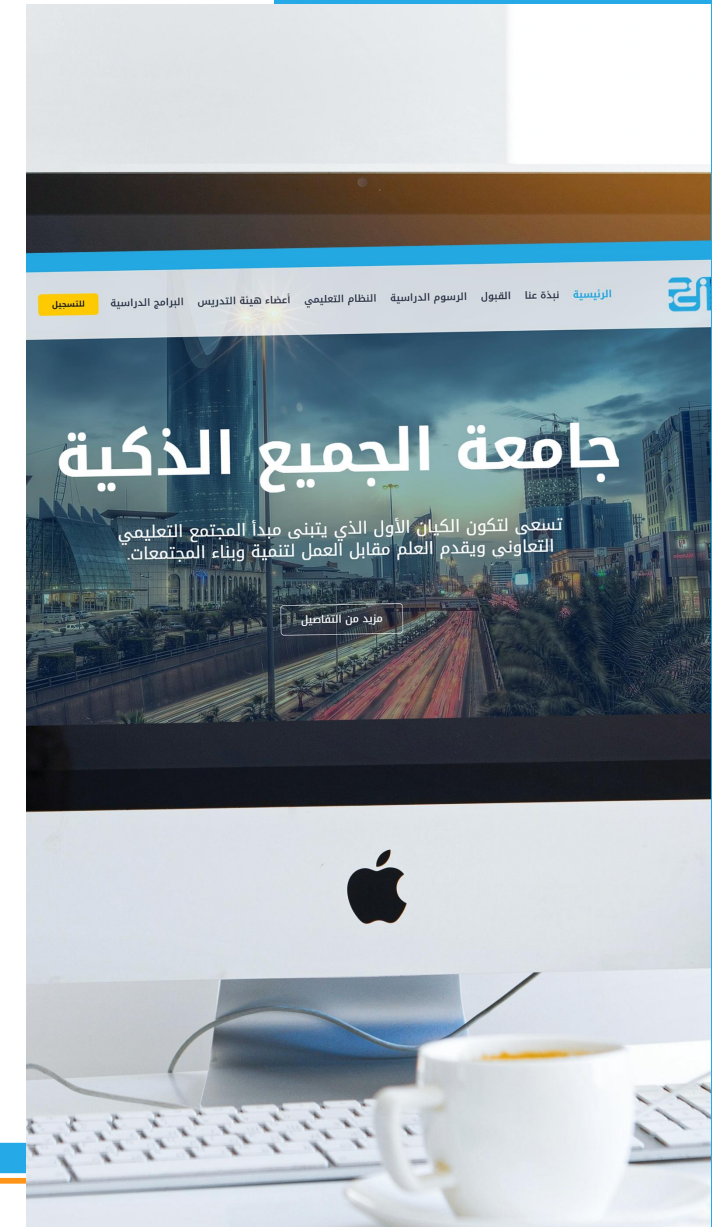
Knowing when should midterm and final term evaluation be started for your program/project

▪ Step 2: Develop clear Terms of References (TORs) and budget for evaluation:

This is an important job. Without clear TORs and enough budget allocation to evaluation, the organization will not know the progress, development and impacts of the project and cannot closing the project

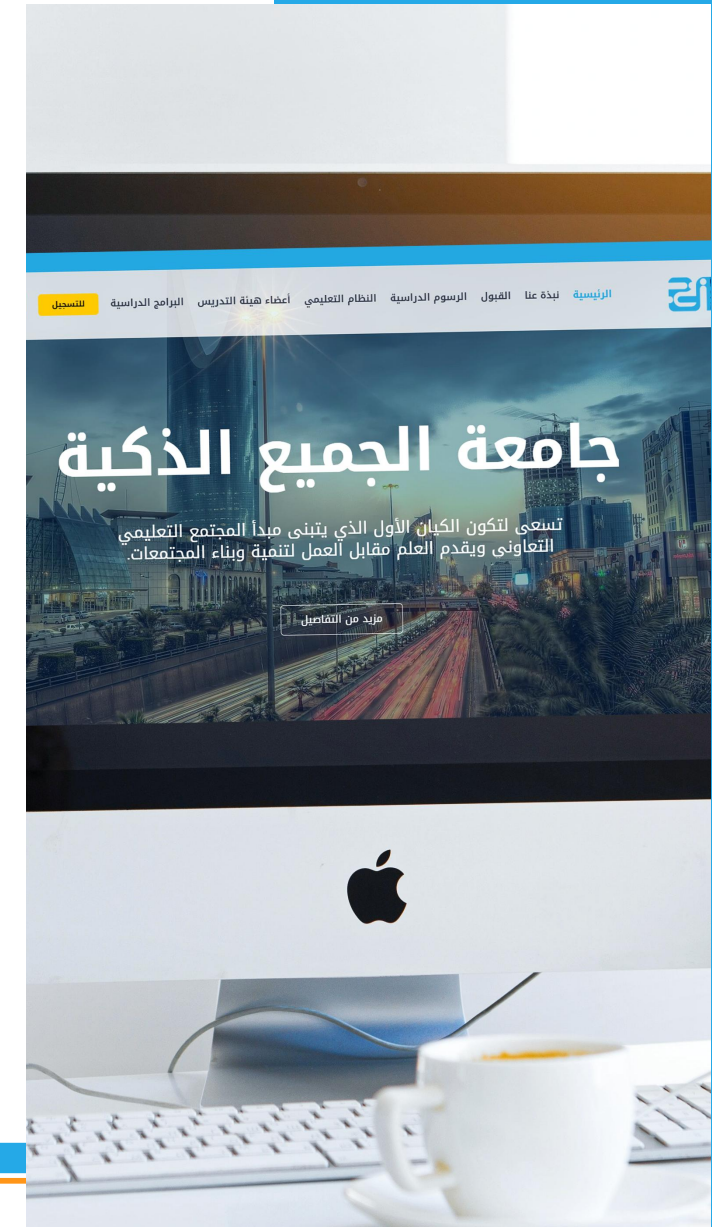


- **Step3: Recruit qualified external consultant or team of consultant:**
- Carry out evaluation task based on agreed TORs, termes and conditions
-
- **Step 4: Coordinate/ facilitate consultant or team of consultant:**
The M&E Unit/Department staff will facilitate consultant team to perform the task including assisting in logistic arrangement (contact key informants, beneficiaries groups, stakeholders etc.,)



- ***Step 5: Take actions / recommendations for next implementation phase:***

After report is concluded and finalized, your organization and management team will need to consider and take appropriate actions from the report's recommendations and for development of next phase/ cycle of the project.



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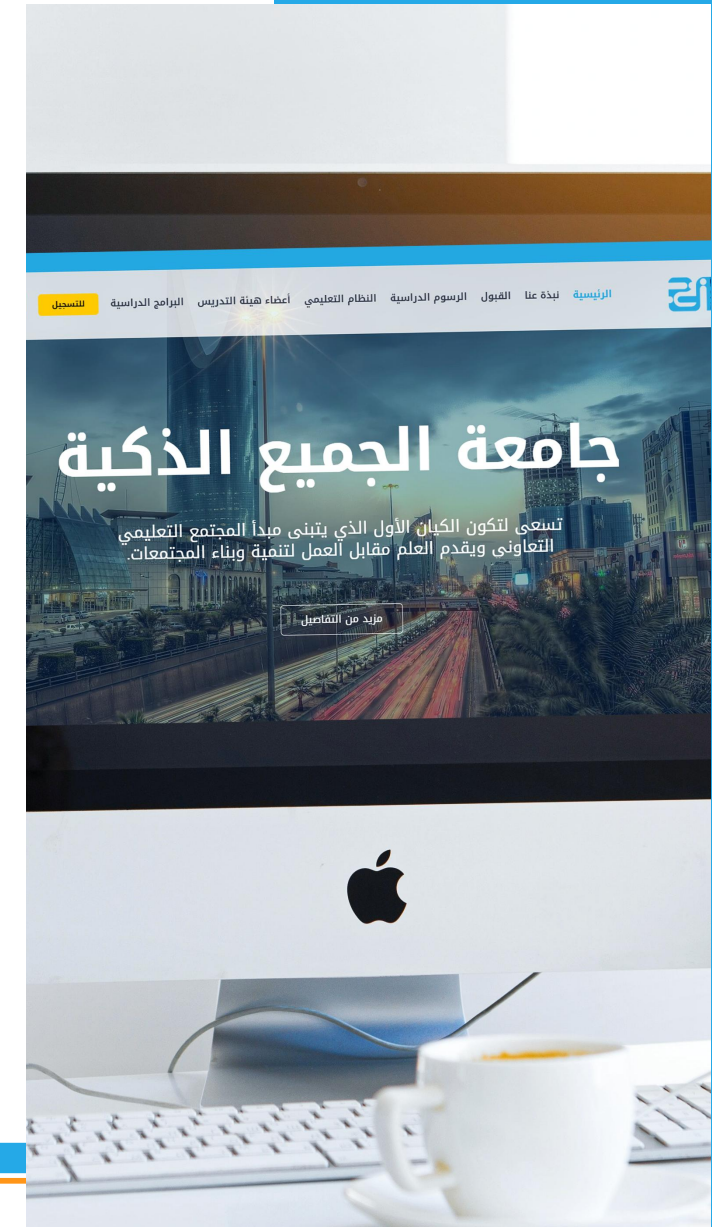
Starting

Planning

Execution

the final
stage and
review

- **Finalize a plan for collecting and analyzing monitoring data. And start to think about it while selecting the indicator and designing the project.**
- **Review lessons learned from previous initiatives, Clearly define the overall goal and results, develop relevant indicators. And start developing a plan for data collection and analysis.**
- **Collect data from different sources using different methods, analyze, interpret and exchange conclusions. The data collected should be used to guide good practice and performance-based programming.**
- **Collect data from different sources using different methods, analyze, interpret and exchange conclusions.**



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