

# Monitoring and Evaluation Manual



Handbook on monitoring and evaluation of  
development projects



# Monitorings and Evaluation manual



Disabled People's Organisations Denmark, DPOD, is grateful to everybody who has contributed to developing this manual.

We thank the member organisations and individuals who have taken part in the M&E working group and devoted great efforts to validating the manual. Special thanks are due to Line Lund from the Danish Association of the Blind for her great work, to Birgit Christiansen from the Danish Brain Injury Association, and to consultant Finn Hansen for his helpful comments. Finally, we wish to express profound gratitude to Henry Lind for his passionate dedication to the preparation of the manual.



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**Printing:** Hellbrandt Trykcenter, DK-Hvidovre

**Danida** Financed by Danida

# List of contents

## Introduction 5

### 1. Monitoring 6

- 1.1 What is monitoring? 6
- 1.2 Why do we monitor? 7
- 1.3 Who is in charge of monitoring? 9
- 1.4 How do we monitor? 9

### 2. Monitoring using LFA 11

### 3. Indicators 13

- 3.1 What is an indicator? 13
- 3.2 The good indicator 14
- 3.3 SMART 14
- 3.4 Make it simple 17
- 3.5 What should indicators show? 18
- 3.6 Types of indicators 18
- 3.7 Direct and indirect indicators 20
- 3.8 Easy and difficult indicators 20

### 4. The planning stage 21

- 4.1 Well begun is half done 21
- 4.2 Monitoring plan 21
- 4.3 Other parts of monitoring 23
- 4.4 Can we afford it? 23
- 4.5 Adjustment of monitoring 23
- 4.6 Starting point: the baseline 24

### 5. Monitoring during project implementation 25

- 5.1 The monitoring system 25
- 5.2 Data collection 26

### 6. The good report 28

### 7. The good follow-up visit to the local chapter 30

### 8. The good project visit 32

- 8.1 Planning a project visit 32
- 8.2 Programme 33

### 9. Evaluation 35

- 9.1 What is an evaluation? 35
- 9.2 Why do we evaluate? 35
- 9.3 Participants 36
- 9.4 When do we evaluate? 36
- 9.5 Evaluation and monitoring 36
- 9.6 TOR 36
- 9.7 Evaluation criteria 37

### Glossary 40

### Annex 41

**Annex 1:** Catalogue of ideas to formulate indicators

**Annex 2:** Example of TOR for project evaluation

**Annex 3:** Suggested format of questionnaire to register individual project participants

**Annex 4:** Suggested format of list to register participants in meetings, courses, etc.

**Annex 5:** Example of format for follow-up visit to local chapter

**Annex 6:** Example of programme for project visit

1

2

3

4

5

6

7

8

9

Glossary

Annex



# Introduction

To some people, a monitoring and evaluation manual may sound like yet another administrative burden imposed upon development work. Nevertheless, this one has been conceived as a tool to make the project even better.

In a reader-friendly style, the manual provides answers to what monitoring and evaluation are about, and what it takes to perform them. Numerous specific examples are presented, and annexes at the end serve practical purposes in day-to-day work, including a list to inspire the programming of monitoring and evaluation visits, and a catalogue of ideas for the formulation of indicators.

The manual is short enough to be read from cover to cover, but it is also intended as a reference work, where you can search for answers to questions faced in relation to monitoring and evaluation.

The manual addresses anyone who is interested in and works with development projects. Another version has been prepared in Danish for partners in the North.





# 1. Monitoring

## 1.1 What is monitoring?

International development cooperation is a world unto itself. As in many other specialist circles, professional jargon abounds, including the term ‘monitoring’. The word ‘monitor’ is derived from Latin, where it means ‘watches over and reminds’.

**Our definition of monitoring:** Ongoing and systematic watching over of activities and outputs.

We all conduct monitoring on a day-to-day basis in various ways and with differing degrees of thoroughness. For example, we constantly monitor our children. When they are born, they are measured and weighed. We keep an eye on when they take their first steps and utter their first words. Later, we follow how they do at school, and much else. We often talk with other parents about our children, exchanging experiences. Few people write down the exact time at which their child took the first step, grades achieved at school, and so forth. As a result, there is no documentation of how the child has developed, only our memory, which may play tricks on us, as when we say: “My child was always so easy,” conveniently forgetting all the illnesses and worries. By contrast, the doctors often keep a meticulous record of the child’s development, which can be described as more properly documented monitoring.

In development work, we use monitoring to watch over and document the process and outputs produced in a project or an organisation. We may also monitor changes in the living conditions of people with disabilities in general.

Everyone will normally monitor their project in one way or another, but it often takes place somewhat haphazardly. Sometimes we do it in one way, at other times in another, and we frequently take no notes. Even when we do write down something, the data may not be compiled so as to enable us to make sense of it, that is, it may not be done systematically. If we fail to monitor properly, it can make it harder for us to know if we are on the right track, and to learn from the project.

## 1.2 Why do we monitor?

### • In order to steer and improve a project, and to learn from it

The chief objective of monitoring and evaluation is to enable ourselves and our partners together to steer and improve a project, ensuring our performance is of a high quality. Even when we do not monitor and evaluate systematically, we tend to have a hunch about how a project is proceeding, and about whether our organisation is developing. However, the various partners in development cooperation may have differing hunches, and there is no guarantee that our intuition corresponds to reality. There will also usually be a wealth of information and conditions of which we remain unaware in the absence of systematic monitoring.

If we have a project aimed at building capacity within our organisation, we know how many people sit on the board. We are also likely to know how many rank-and-file members we have got, and how many local chapters of the organisation exist around the country. But do we know how the organisation has developed over the years?

Do we know how many people truly feel affiliated to the organisation?

What is the situation out in the local chapters?

Do they conduct activities for their members?

How much income do they generate?

Do they take minutes of their meetings? And so on.

If we had a way of gathering such information and store it in a single place, we would know about these aspects. If the data revealed problems in keeping the finances in order, we could, for instance, adjust the project, providing more training in this subject. Another option might be to change or shut down the project, if it turns out not to produce any development at all.

### • In order to possess documentation for use in rights work

Monitoring is an important weapon in lobbying and the pursuit of rights. A precondition for effective rights work is an ability to continuously follow and document developments in the plight of people with disabilities, for example: What percentage of these women and men are illiterate, and how does this compare to the general population? How many paraplegics die as a consequence of pressure sores? How many children with disabilities attend school? And so forth. If we know the actual conditions of those with disabilities, it is much easier to demand improvements and make constructive proposals for how to bring them about.

For instance, if our rights work is concerned with integrating children with disabilities into the education system, it is important to follow trends on the ground, and to count on reliable data.



We may not necessarily have to collect such information ourselves. Perhaps it already exists, and merely needs to be obtained, or we may lobby the relevant authorities to prepare reliable figures.

The Organisation of Deaf People, ODP, often provides interpreting assistance to the police and other authorities. Its five sign-language interpreters are the only ones of their kind in the whole country. However, ODP does not know how often this happens. This leaves them in a weak position when negotiating with the government about covering the costs of the interpreters' wages and demanding the training of more interpreters. Had they written down the frequency of their help to the authorities, they would have been able to go to them and say: "We have provided interpreting assistance to the police 62 times in the course of the past year, 18 times to the judicial system, and 47 times to the tax authorities. On average, they spent five hours each time. It is fair that the state should pay the wages of, say, two interpreters."

- **In order to check if the project is achieving its planned objectives**

Many donors make stringent demands for documentation that the project implemented does in fact produce the benefits that were promised when the funds were applied for. There are clear signs that such requirements will increase in the future.

Consequently, it is easier to obtain funds for new interventions, if we are able to prove that our projects have reached the objectives set beforehand.

It is also highly motivating for ourselves to know that our projects achieve their goals.

- **In order to inform our own members and others**

It is commonplace that an organisation has no realistic and up-to-date membership register. This may spring from a deliberate wish to pretend to have more members than is really the case, or from a failure to update the list to take account of people who have moved away, left the organisation, or even died. It may be tempting to inflate the membership figures this way, but it will give rise to a credibility problem both to the outside world and internally among our own people. It will also deprive us of a proper management instrument for our organisation, which is in fact what a good and up-to-date membership register is all about.

A membership register is but one example of a monitoring tool that is useful in information work with members and other interested parties.

When the Ministry of Education launched a literacy campaign, it took an initiative to involve people with disabilities, knowing that many of these were illiterate. The ministry convened various disability organisations to a meeting, asking them for the names of members unable to read and write. Subsequently, organisation Alfa went straight back to the office and printed a list of illiterate members right from their database. The other organisations, however, spent several months collecting this information, and never really got off to a start in the literacy campaign, whereas Alfa succeeded in halving the rate of illiteracy among its members.

### 1.3 Who is in charge of monitoring?

As a general rule, those who implement a project are also responsible for monitoring it. These people may be project personnel, though in some cases consultants can be hired. It will always be a good idea to involve the implementing organisation's governing body in decisions regarding monitoring, as long as there is a project team to take care of the practical work. It is also useful to engage the partner from the North, who may provide suggestions and inputs to the monitoring.

### 1.4 How do we monitor?

Much like a house is made up of a foundation, walls and roof, monitoring also comprises various components.

A part of our project monitoring is stored in terms of experiences and impressions inside the heads of the various parties. However, this is a somewhat insecure place to save information, as the human hard disk is prone to lose data. It is only a case of formal and systematic monitoring when documentation is available, normally in the shape of text, though it may also be pictures or sound.

Below some common elements of monitoring are presented.

#### Monitoring of indicators

Many would place the indicators at the heart of the monitoring exercise, and this is indeed the aspect to which this manual dedicates the most pages. This will be elaborated upon in Chapter 3.

#### Registration of participants

A good place to start monitoring is by registering project participants, since the project descriptions often establish that a certain number of persons (with disabilities), usually specified by sex, will take part in activities. In order to document this, it is a good idea to keep a record of participants. If we do this in a detailed manner, e.g. including information about gender, age, geographical origin, rural/urban dwellers, type and degree of disability, we will be able to intervene if the figures reveal a skewed distribution, for instance as regards gender or disability status. It has been seen before that a great deal of participants in a project targeting people with disabilities are not, in fact, disabled, or only to a slight degree, whereas those with severe disabilities were largely absent. If we have good statistics about the participants, we are able to ascertain this rather than just rely on gut feeling. Annexes 3 and 4 provide examples of forms used to conduct registration of participants.

#### Follow-up visits

The project staff will normally carry out follow-up visits to the various project activities, if these are not implemented by themselves. Systematic documentation of these exercises is an important part of monitoring.



## Impact studies

Even the best indicators cannot reveal everything about a project's development. They tend to yield dry facts, and are not good at explaining why a process has moved forward.

Therefore, it may occasionally be useful to delve further into a particular theme. This can take the shape of a so-called impact study, which measures the lasting effect of a project intervention. It might be an investigation into the value of training conducted as part of an ongoing or completed project. In this case, the study will be based on interviews with former trainees in order to examine whether they are using what they learned six months or longer ago. A result to look for might also be a boost in their self-esteem, and the like. Another approach could be to conduct recurrent interviews with focus groups.

The various elements of monitoring are re-assembled at particular moments in time, being used, as previously mentioned, to analyse whether the project is on the right track. Below is a description of where and when we use the collected information in our monitoring.

## Project visits

Most projects contemplate prescheduled visits from the partner in the North. The project visit may be an actual element of monitoring itself, but first and foremost, it offers the two parties an opportunity to go through the monitoring data together.



## Progress reports

Reports are submitted in the course of all project periods, using information from the monitoring.

See the section on the good report on page 28.

## Reviews and evaluations

The final evaluation, as well as possible mid-term reviews, will always use and analyse the monitoring data, and the better the monitoring, the better these exercises will be too. Read more on page 35.



## 2. Monitoring using LFA

Most projects are designed using a planning tool called ‘Logical Framework Approach’, LFA. A fundamental knowledge of LFA is necessary to make optimal use of this manual. There is a wide array of literature on this method, and courses are offered as well.

In synthesis, LFA is based on a division into different levels, namely **development objective**, from one to three **immediate objectives**, in addition to **outputs** and **activities**.

The development objectives is our long-term perspective, our vision or motivation for what we do, e.g. “Integration of people with disabilities into society”

An immediate objective is what we will, in all likelihood, achieve through our project, and needs to be formulated in very specific terms.

The outputs are what we ought to guarantee will be in place once the project activities have been performed. Outputs must also be phrased very specifically.

The LFA is based on the premise of a logical connection between activities, outputs, immediate objectives, and development objective. This means that the activities must produce the outputs, which are what the project should be able to guarantee. These outputs, in turn, must be very likely to lead to the immediate



objective(s). Finally, compliance with the immediate objectives will contribute towards the development objectives, whose achievement will, however, depend on other projects and factors as well.

Even when we formulate our immediate objectives and outputs clearly, it can be hard to measure if we are headed in the right direction, or – at the end of the project – to know if we have reached our goal. This is why indicators are established at each level, although rarely for the activities.

The indicators are introduced into the so-called ‘LFA matrix’, which presents the project planning in a schematic form. Section 3.3 presents an example of an LFA matrix.



## 3. Indicators

### 3.1 What is an indicator?

Projects carried out by the disability movement are often about awareness-raising, advocacy, empowerment, sensitisation, capacity-building and the like. These are broad and general terms, which can be understood very differently by the various participants. Project outputs and objectives frequently feature expressions such as “empowerment has taken place” or “awareness has been raised”.

It is important to avoid such vague phrases when formulating our immediate objectives and outputs. Not only are they likely to be interpreted in a personal fashion, they are also virtually impossible to measure. To make it even clearer and more concrete what we wish to achieve, we establish indicators.

**Definition of indicators:** Criteria to judge whether a project is achieving what it has been designed to achieve.

As in the case of monitoring, indicators are also something we use or hear about on a day-to-day basis. Sports people and teams often set themselves the target of being among, say, the top five, once again an indicator of whether or not an objective has been achieved. Companies often establish a ‘success criterion’, another term for indicator, stating a certain level of profit that ought to be generated. These two examples can be expressed in figures without major problems. It becomes slightly more complicated when the aims are ‘soft values’. A firm might, for example, set the goal of having satisfied employees. On the face of it, this may be hard to quantify, but not impossible. The number of sick days might indicate this. The degree of personnel turnover could also serve as



an indicator, just as the workers could be asked about their degree of satisfaction on a scale from 1 to 5, which could then be related to an indicator with a particular target.

### 3.2 The good indicator

To make an indicator useable, it must be carefully selected and phrased. Usually one or several indicators are formulated for the development objective, for each immediate objective, and for the outputs. It is rarely necessary to establish indicators for activities.

When formulating the indicators, we start from the output or objective concerned. We may ask ourselves: What is it that we specifically wish to achieve with this output or objective? Once we know this, we may ask again: How would we be able to notice it when this goal has been attained?

If the immediate objective is “The capacity of organisation OPD has been enhanced by 2013”, the question would be: What might indicate enhanced capacity? It could be about the capacity to design projects, better control of the finances, a more complete membership register, etc. On this basis, indicators are formulated.

It can be helpful to involve several persons in drawing up the indicators. A brainstorming session may produce good ideas, enabling selection of the best ones. Perhaps you can look into whether other people have made indicators in the same field that you wish to monitor. For example, the government may be using some. By choosing the same, or some that are close, you have a chance to enter into a dialogue with the authorities about performance according to those indicators. It is also possible that other NGOs have applied similar indicators. What are their experiences of monitoring those? Is there a chance of cooperating around the follow-up?

Since it is the project-implementing organisation which has the chief responsibility for monitoring, it must obviously also be in charge of formulating the indicators, possibly with support and advice from the partner in the North.

As inspiration to the preparation of indicators, see Annex 1: “Catalogue of ideas for indicators”.

### 3.3 SMART

It may be difficult to come up with good indicators in the beginning. Some rules, however, can help us. To make them easier to remember, they have been summed up in the acronym SMART.

**S**pecific  
**M**easurable  
**A**chievable  
**R**elevant  
**T**ime-bound

### Specific

The indicator must be very precise as regards target group, geographical coverage, quantity and quality. Quantity refers to an amount or volume that can be captured as a number or percentage proportion, while quality may be described with words. As we apply ourselves to monitoring in practice, we will discover the importance of indicators not being open to interpretation, eliminating any doubt as to what we are measuring. We may even choose to define our indicator in greater detail in our monitoring plan (see page 21).

Subjective expressions, such as “in a satisfactory manner”, “good minutes” or “regular meetings” should be avoided, since there may be more than one opinion of what is satisfactory, good and regular. Certainly, if we insist on using such terms, it must be defined what we mean by them.

Likewise, it is important to avoid generalities such as “increased capacity”, “greater self-esteem” or “better understanding”. Here, we certainly cannot resort to percentage figures, as in “the participants’ self-esteem has been enhanced by 45%”. Monitoring such an indicator would be an impossible task. It needs to be rephrased, and we have to ponder what might indicate greater self-esteem, as in the example of more satisfied employees.

#### Examples of an indicator that lacks precision:

“The organisation has a good financial situation”.

#### This could be rephrased as:

“In 2012, OPD has an annual income of USD 30,000 in addition to the funds received from international donors, which represents an increase of 28% compared to 2009.”

### Measurable

It must be possible to measure an indicator at reasonable cost and effort, just as reliable information needs to be available. We have mentioned that the indicator must be accurately phrased. This is the first condition for its measurability. The money and work expended on measuring an indicator must also match the importance of obtaining the data. For instance, it makes little sense to launch a major survey costing thousands of dollars to monitor the indicator of a project of, say, USD 100,000. Nor is it appropriate for the project personnel to set aside an enormous amount of their time to monitor an indicator. Consequently, indicators must be designed so as to be simple and without major costs to monitor. If this is not possible, the indicator must be dropped and others must be found. As a rule of thumb, the cost of actual monitoring should not exceed 2-5% of a project budget. The information available in a developing country may often be less than reliable. If it is estimated that trustworthy data cannot be obtained, the indicator must be discarded.



**Example of an indicator for which it is hard to find reliable information:**

“By 2012, the members of OPD have increased their income by 15% compared to 2009”.

This indicator is awkward to deal with, since it requires a major survey of the members’ earnings. This is an expensive exercise, and the results would tend to be uncertain, since poor people in developing countries often have several small incomes, which are unstable, rather than a permanent paid job. This makes it hard to calculate a monthly income figure. Even though the indicator would be interesting to know about, it must be abandoned or rephrased.

## 3

**Achievable**

It must be realistic to reach the target set out in an indicator. Many young organisations have limited experience of organisational and rights work, yet compensate by their enthusiasm, setting themselves goals that are wholly unrealistic. If we operate with impossible targets, we will become frustrated when we fail to reach them, and perhaps we then become less enthusiastic. Conversely, it is always motivating to achieve realistically defined goals.

A project had the indicator of increasing the membership of an organisation for haemophiliacs by 100%. After project completion, the intake of new members amounted to 55%, and there was a sense of failure, since only half the target had been reached. Nevertheless, most organisations would celebrate a membership increase of 55% during such a brief period. In other words, the project had not really failed, but had set its sights too high.

On the other hand, it is also possible to set the target too low. Some organisations have been known to deliberately set out very modest progress in their indicators in order to be certain to fulfil them, hoping to avoid tough questions from their donors. Here, however, it must be kept in mind that – as established in Chapter 1 – monitoring is a management and learning tool for the project itself. Satisfying the donor is not the main reason for it. Defining indicators with deliberately low targets will fool few donors, and we risk making ourselves self-satisfied.

**Relevant**

It hardly helps to come up with a precise indicator, if it is irrelevant to the objective or output whose fulfilment it is to measure. This applies particularly if there is only one or very few indicators.

**If an immediate objective is:** “By 2012, the capital Nejapa has become more accessible for people with disability”, an indicator would be irrelevant if it said: “By 2012, 200 posters on accessibility have been produced”, and if that stood alone. This would not show whether the capital had become more accessible, but merely whether the project had completed production of a poster, which might even be gathering dust on some shelf.

### Time-bound

It is important to know when an indicator should be fulfilled, which is why the time of compliance with its target must be included. It is usually enough to mention the year. Since we generally assume that indicators must be met upon project completion, many forget to specify the year, but this is an important detail.

It can be useful to define intermediate goals for each year, especially if the project runs over two years. This is also called setting milestones, and just as we cheer up on a long drive, when we see on the milestones that the distance to our destination has shortened, so it is also pleasant to reach an intermediate goal. Indeed, when these are achieved, it is a good idea to celebrate the achievement.

Let us look at an example:

**Immediate objective:** By 2012, OPD has undergone organisational strengthening and has become more sustainable.

**Indicator:** In 2012, OPD has an annual income of USD 30,000 in addition to the funds received from international donors, which represents an increase of 28% compared to 2009.

**Specific:** The indicator sets out the amount of the organisation's income, and what types of income should be included.

**Measurable:** If the organisation has a reliable accounting system, it will be easy to measure this indicator, and the progress can be followed from year to year. Nor does it cost anything to monitor this.

**Achievable:** A 28% increase over three years should, given a methodical effort, be a realistic target, but obviously this presupposes knowledge of the organisation concerned and the conditions under which it operates.

**Relevant:** An increase in self-funding must be described as highly relevant to an organisation's sustainability.

### 3.4 Make it simple

It is important that we try to make indicators and monitoring as simple as possible. Two or three precise indicators that are relevant and easy to measure are much more useful than ten inaccurate and complex indicators.

If you insist on having many indicators, due to a project's complexity, it may be a good idea to select 5-7 hard-hitting and comprehensible indicators that may be presented to members, government, donors, and others.

Although it is commonplace to formulate indicators for a particular project, it will often be beneficial to carry on monitoring after project completion as part of an organisation's capacity building. To this end, it is also vital not to operate with an excessive amount of indicators.

### 3.5 What should the indicators show?

As previously mentioned, indicators may be used in numerous contexts, and in the LFA, we apply indicators at various levels. It is often enough to prepare indicators for the immediate objectives, but for those wishing to go one step further, it will here be explained which types of indicators are most suitable for each level of the LFA matrix. Others might choose to skip this section.

#### **An example:**

Organisation OPD is not that experienced in rights work. At an LFA workshop, they conclude that there is insufficient capacity in the organisation to plan and implement such efforts. Consequently, they wish to train 30 midlevel leaders in rights work in order to improve the living conditions of people with disabilities.

They list the activities, outputs, immediate objective and development objective with attendant indicators shown in the matrix on the next page. Normally, several outputs and immediate objectives will be drawn up. This has not been done here, as it is merely an example.

### 3.6 Types of indicators

As previously mentioned, there are various types of indicators, which are generally used at different levels in the LFA matrix. This section is for those who wish to go a little further into the issue of indicators, and may be skipped by others.

#### **Activity indicator**

An activity indicator shows whether an activity has been carried out, but says nothing about the effect that it might have produced. An example is “By 2012, 28 midlevel leaders have been trained in rights work” or “By 2012, 4000 brochures on accessibility have been produced”. In these two cases, verification of the indicators will show whether the expected number of leaders have indeed been trained, and brochures been produced, but there is no information as to what uses the training has been put to, or whether the brochures are gathering dust in some backroom. Sometimes the number of participants, e.g. in training sessions, is set lower in the indicator than as an activity, thus signalling an expectation of a certain dropout along the way.



The number of trainees or produced units will normally be stated in progress reports and the like, and are not particularly suitable as indicators. Activity indicators are generally not recommendable, and should certainly never stand alone.

#### **Process indicator**

The development of an organisation and the struggle for rights are often long-term processes with a whole host of stops en route, before we reach, perhaps via some detours, the desired destination. In order to measure if we are headed in the right direction, process indicators are defined. They show whether a given activity (e.g. training) is

### Example of indicators

	Indicators
<p><b>Development objective:</b> All public buildings in the Province of Dali are accessible to people with disabilities.</p>	<p>The number of public buildings in the Province of Dali has risen from 65 in 2009 to 90 in 2012, equivalent to an increase of 38%.</p> <p>For a building to qualify, its installations must conform to norms for accessibility in the Republic of Mali. <b>(Impact indicator)</b></p>
<p><b>Immediate objective:</b> By 2012, OPD has increased its capacity to conduct rights work, particularly in relation to accessibility.</p>	<p>By 2012, the Province of Dali has an Accessibility Council with representatives from the disability movement and local authorities. <b>(Process indicator)</b></p> <p>By 2012, OPD has drawn up a strategy for improvement of accessibility in the Province of Dali, and passed it on to the relevant authorities. <b>(Process indicator)</b></p> <p>By 2012, OPD has prepared an analysis of the accessibility of public buildings in the Province of Dali. <b>(Process indicator)</b></p>
<p><b>Output 1:</b> By 2012, 30 midlevel leaders from OPD have been trained in rights work.</p>	<p>By 2010, 8 of the trained midlevel leaders have become members of the Municipal Development Council. <b>(Process indicator)</b></p> <p>By 2012, 20 of the trained midlevel leaders have become members of the Municipal Development Council. <b>(Process indicator)</b></p> <p>By 2012, 25 of the trained midlevel leaders have participated actively in rights work by contributing to the preparation of strategies, proposals to municipalities, etc. <b>(Process indicator)</b></p>
<p><b>Activity:</b></p> <ol style="list-style-type: none"> <li>1.1 Preparing teaching aids for training in rights work.</li> <li>1.2 Selecting trainees on the basis of defined criteria.</li> <li>1.3 Training 30 participants during 7 days.</li> <li>1.4 Exchanging experiences six months after the training.</li> </ol>	<p>28 midlevel leaders take part throughout the course of training. <b>(Activity indicator)</b></p>

leading to the desired process. Perhaps the former trainees are using what they learned in their day-to-day work. See the examples above. Process indicators are often applied at the level of outputs and immediate objectives.

### Impact indicator

The ultimate goal of all good project work is to achieve a lasting impact, i.e. changes in, say, livelihood conditions that last far beyond the project period. In interventions by the disability movement,

the aim tends to be better living conditions for people with disabilities, including greater inclusion in society and respect for their human rights. If we fail to make progress towards this, our endeavour can be described as wasted. However, the impact often arises only after several years of work. The plight of people with disabilities is not necessarily improved by some training, a seminar or information material. This makes it important for us to measure the impact of our combined efforts towards improving the living conditions of people with disabilities. To this end, we use impact indicators.

As in the example, it could be about improved accessibility, integration into the labour market, greater self-esteem, better access to the health system, etc. If we use the indicators in relation to our rights work, we will often need to focus on impact indicators. Impact indicators tend to be used for development objectives or immediate objectives.

As can be seen from the example in section 3.5, there is a tendency to use impact indicators more as we move upwards in the LFA matrix. However, there are no definite rules for this, just as the boundary between impact and process indicators is not clear-cut.

### 3.7 Direct and indirect indicators

If an immediate objective of a project is highly specific and material, e.g. “building of rehabilitation centres” or “higher income”, the indicators will also be so, enabling direct measurement of whether the planned outcome is achieved.

When the objectives feature softer values, such as ‘self-esteem’, ‘capacity’ and ‘awareness’, which are hard to measure, then we have to formulate ‘indirect indicators’, which measure likely repercussions of greater self-esteem, capacity or awareness. The example given in the beginning of this chapter, as regards a firm setting out to boost employee satisfaction, illustrates the need for indirect indicators.

### 3.8 Easy and difficult indicators

Some indicators are very simple to measure. For example, the number of local chapters will normally be easy and cost-free to find out. Conversely, in the example in section 3.2, we saw how difficult it might be to measure an increase in members’ income.

Particularly in the beginning and in small-scale projects, we should always choose indicators that are easy to measure and produce reliable data on.



## 4. The planning stage

4

### 4.1 Well begun is half done

Well begun is half done, so goes the old adage. This also applies to monitoring. Once we are in the midst of a hectic process of designing a project, we often hasten to come up with some indicators, as their formulation is an obligation. Then we do not revisit our indicators, until the donor demands an answer to how their fulfilment has turned out. At that stage, it may be hard to find the relevant information, and we often do not know the starting point. This obliges us to make an estimate of compliance with indicators, hoping that the donor will refrain from posing tough questions. However, if we return to section 1.2 “Why do we monitor?” we are reminded that the main reason is to optimise project management, to learn from it, or to use the data in our rights work. By failing to plan our monitoring, it becomes difficult to use it as a management tool, and even in the eyes of the donor, monitoring devoid of planning has limited value.

Formulating of indicators  
Monitoring plan  
Adjustment of indicators

Baseline  
Monitoring plan  
Adjustment of indicators

Data collection and  
analysis  
Adjustment of indicators

Evaluation  
Analysis of monitoring

Project formulation

First three months of project

Project implementation

Project completion

### 4.2 Monitoring plan

In order to facilitate monitoring and avoid overlooking something, it is a good idea to draw up a monitoring plan as early as during project formulation or during rights work planning. The making

of the plan will oblige us to check the quality of the indicators and ask ourselves some highly relevant questions.

- Have our indicators been formulated with sufficient accuracy, or is there a need for further definition?
- How and from where should data be gathered?
- How often should this be done?
- When do we monitor?
- Who is actually responsible for having it done?
- Where do we record the data?

These questions can be entered into a matrix (see below).

#### How and from where should data be gathered?

The LFA matrix contains a column under the heading of ‘means of verification’, i.e. where to find the data for the monitoring of an indicator. It is important to be very specific here too, entering into the LFA matrix as well as the monitoring plan specifically how and where we envisage finding the information, rather than providing a long list of mere suggestions to this effect.

### 4.3 Other parts of monitoring

In section 1.4 “How do we monitor?” we saw how monitoring comprises several elements. The table below first and foremost concerns the indicators, which may indeed be at the heart of monitoring.

Indicator	How and from where should data be gathered?	How often should the indicator be monitored?
In the course of the project period, the disability movement in the Republic of Madagascar draws up four legislative bills or amendments. At least two of these bills or amendments are passed.	From the disability organisations with copies of legislative proposals	Continuously
In 2012, OPD has an annual income of USD 30,000 in addition to the funds received from international donors, which represents an increase of 28% compared to 2009.	From the organisation's annual accounts	Annually
By 2012, an accessibility council has been set up in the Province of Dali with representatives from the disability movement and local authorities.	Interviews with authorities and organisations in the Province of Dali	Annually
80% of OPD's members know the Disability Act by 2012	Membership survey	Every second year

Nevertheless, it is also important to plan the other aspects of monitoring. When should the project visits take place? When do we schedule the midterm review? And so forth. This planning can form part of the activity plan, which is drawn up during project formulation.

#### 4.4 Can we afford it?

Once our monitoring plan has been prepared, we need to ask ourselves what it will cost. Some indicators can be monitored virtually cost-free, apart from a little time invested by the project staff. Others entail major expenses, for example, transport and photocopying. Finally, the verification of some indicators may call for major and expensive surveys.

It is necessary to go through the indicators one by one to estimate the costs. Minor spending on monitoring is usually accepted by the donor without objections, and can appear as an item on the budget. If one or several indicators entail major costs, e.g. for surveys, it is normally necessary to rephrase or discard them. If a case can be made that a survey is important for the organisation charting its course, it may be a good idea to conduct it anyway.

#### 4.5 Adjustment of indicators

When drawing up the monitoring plan, we may discover that an indicator becomes too complex to monitor. Perhaps we acknowledge that the information available is unlikely to be reliable, or that it will be too troublesome and expensive to collect the data. We may frequently be unable to find even elementary statistical information. Consequently, it is essential that we adjust the indicators, by

When?	Who is responsible?	Where should the data be recorded?
Each time a new legislative bill is prepared	Person responsible for advocacy	Monitoring system, while copy of legislative proposals/resolutions are kept on file
Each year in February	Person responsible for monitoring	Monitoring system with reference to accounts on file
Each year in March	Person responsible for organisational development	Monitoring system, survey questionnaires are kept on file
January 2010 and 2012	Consultant	Monitoring system, survey is kept on file



either reformulating or completely discarding them. This is another reason to draw up the monitoring plan at the same time as the project is designed.

#### 4.6 Starting point: the baseline

As described in section 1.1. “What is monitoring?” we constantly monitor our children’s development, e.g. by measuring their height, weight etc. In order to know if the child is growing up normally, it is crucial to know the starting point, such as the child’s height and weight at birth. In development work and monitoring, this starting point is called ‘baseline’. It is necessary to know the initial situation in order to assess the development of an indicator.

In haste, we often forget to write down the starting point. Then one or two years later, we need to know what it was. On some instances, it may be impossible to find, and the indicator becomes worthless. On other occasions, it is possible, but requires more time, and the data can be uncertain if it relies on people’s memories.

The baseline for a new project can either be prepared right before it starts, or within the first three months of its implementation. In the case of a project divided into several phases, the final monitoring of one phase can often serve as the baseline for the next.





## 5. Monitoring during project implementation

## 5

### 5.1 The monitoring system

The example in Chapter 1 mentions how most people monitor their children's development, but that they rarely do so systematically, failing to write down anything about it.

*When we collect data systematically and register this information, one may speak of a **monitoring system**.*

To avoid a last-minute rush to find the various reports and documents at the time when we need to use our information, it is important to store the data in a single place.

The physical registration, or the actual monitoring system, can take place in a variety of ways, ranging from advanced computer programs designed for monitoring, to handwritten records in a notebook. However, in smaller organisations, computer-based spreadsheets are likely to be the most useful method. The core data may for instance be registered on the spreadsheet, while related and explanatory documentation is filed separately.

**Indicator:** In the course of the project period, the disability movement in the Republic of Masa draws up four legislative bills or amendments. At least two of these bills or amendments are passed.

In our example, the umbrella organisation ODP is in charge of monitoring the above indicator, and has entered information into the following table every time something has occurred towards the passing of legislation.

Date	Drawn up by	Submitted to	Title	Status	Bill no.
March 2007	Organisation of Deaf People	Ministry of Foreign Affairs	Recognition of Sign Language in Teaching	Passed in April 2008	346 BT
November 2007	Organisation of People with Brain Injury	Ministry of Health	Amendment of Act No. 246	Not passed	246
May 2008	The umbrella organisation	Ministry of Foreign Affairs	Ratification of convention	Under discussion	
May 2008	Organisation of People with Physical Disabilities	Ministry of Transport	Norms for Accessibility	Passed	356 ZR
August 2008	Organisation of Haemophiliacs	Ministry of Taxation	Amendment of Act No. 147	Not passed	147

At the same time as the information is registered in the monitoring system, it is important to keep the passed bills and amendments on file as documentation.

The project personnel will be in charge of entering the collected data into the monitoring system, while it will be natural for the partner from the North to give advice on system design and to regularly go through it with the partner from the South.

## 5.2 Data collection

Any monitoring system is only as good as the data collected. If we want to use the information gathered to adjust the project, it is important that it be correct. The more we can document compliance with an indicator, the better. The more our data is based on estimates, the less accurate it will be.

Sadly, statistics are not always equally reliable, and it may be wise to cast an eye over the figures and take a critical approach to the numbers. In this task, the partner from the North may be able to assist.

If we hire a consultant to gather the information, it is advisable to follow his or her work, both to learn from the process and to get a sense of the reliability of the data.

If we have reason to suspect that information to monitor an indicator may not merit our trust, it is best to either discard or reformulate the indicator. If figures and facts fluctuate wildly from one year

to the next, there are grounds for caution. At least it is necessary to inquire into the causes of such fluctuations.

In order to utilise, for example, questionnaire surveys, comparing responses in different years, it is important to pose exactly the same questions each year.

Even when the indicators have been carefully designed, some of them will often turn out to be too expensive and difficult to monitor anyway, once the data collection starts. In these cases, it is better to drop the indicator or rephrase it, even if project implementation is in full swing. In such cases, the donor, for example DPOD, should normally be notified.





## 6. The good report

A vast amount of reports are written. Many are indeed read, placed in a binder, and then... forgotten. Whether it be the Northern partner requesting a report from the project staff, or the Southern implementing organisation asking for one from a local chapter, it is important first to come to terms with the actual purpose of the exercise, and who is going to use its information.

It is normally useful to possess a standard format for the report, or at least a predefined structure, both to ensure that it addresses all necessary aspects and to enable the recipient to recognise the way it is built.

Information in reports has often travelled a long way. It may originate in a local chapter, be sent to the head office, which then forwards it to the partner in the North. The Northern partner then passes some of it on to their donor, e.g. to DPOD. Likewise, information is channelled in the opposite direction as feedback to the reports. It may be useful to think through the entire chain from the start. Which data is needed in each link in order to be passed on? If this is well planned, it will simplify the reporting process.

Astronomical amounts of time are dedicated to report-writing, and if the process can be simplified, it will have saved many hours that can be spent on other important work. Consequently, we should always ask ourselves: Is this information necessary? Could it be done more simple? Is the information available somewhere else? A straightforward two-page form summing up the essence is often more useful than eight pages of detail. If we want to add a little colour to the text, it can be spiced up with an anecdote or a photo of fieldwork, which might illustrate the project's progress in a different and livelier fashion.

It is natural that the partner from the North demands reporting on the use of the funds made available, but this should not prevent those in the South from raising discussion on the format, size and substance of reporting. Perhaps the standard reporting form is designed the way it is simply because it has always been like that, and because nobody has looked into simplifying it, or reassessed the relevance of the information requested.

As a minimum, the reporting must compare planned activities with how they have been realised. It is also important to take advantage of the information collected during monitoring, as well as to analyse how compliance with the indicators is moving along. This may not have to take place in each report, but should be included at least once a year.

There can be no good report without good feedback. There is nothing more frustrating than sending off a report, perhaps to a faraway country, and then to hear nothing. This will inevitably make one wonder: Did the report even reach its intended recipient? And if so, did anyone read it? On the other hand, five pages of critical questions in response to a report can be just as exasperating. In order to feed back criticism or pose critical questions, it is important to remember to make two or three positive statements for every negative.

If the recipient of the report remains silent, it is only natural to write and ask if there are any comments or questions to the text.





## 7. The good follow-up visit to the local chapter

Most nationwide disability organisations have local chapters around the country, and the head office may visit these with varying frequency. Such encounters may be fundamental to the local chapters' development.

### Objective

Just as partners in the South may sometimes perceive project visits from the North as controlling their work, local chapters may feel that visits from the head office are intended to check their performance. Even when the follow-up visits do have an element of control, it is important to create an atmosphere of mutual trust, and to give the local chapters a sense that the visits aim to support them in their day-to-day efforts.

Although local chapters are affiliated to a main organisation, it is essential for their performance that they decide what to work on themselves, rather than through imposition from the head office. This is particularly so because local chapters are often based on voluntary work, and it must be kept in mind that there are limits to what can be demanded from unpaid activists. Volunteering must be interesting to them, and not just a troublesome burden.

### Planning

To help instil a sense among local chapters that these visits are an opportunity which they can take advantage of, it is wise to let the subjects addressed be based on local needs for support and ad-

vice. Consequently, the agenda should be agreed beforehand, possibly during a preparatory visit, by telephone or email prior to the meeting. This will also help the local chapter prepare for the event.

The kind of head-office people to set out on follow-up visits may differ, but the most usual procedure is probably to send either hired staff, members of the national board, or a combination thereof.

### **Subjects**

Needless to say, the subjects of follow-up visits may vary widely from one organisation to another, as well as from one local chapter and one occasion to another. Nevertheless, it will often be useful to go through the local chapter's work plan in order to follow up on any outstanding issues or problems encountered. If the local chapter has no work plan – either annual or quarterly – one obvious idea would be to get the head-office people to help prepare one.

Likewise, it will often be valuable if the local chapter has a chance to talk about their achievements, as well as current challenges and problems, discussing possible solutions together.

It is often important that the local chapter be informed about what is going on in the head office, and in which areas work can be coordinated.

Rights work is yet another area in which the head office may assist, depending on the local chapter's capacity in this field. This could be about accompanying the locals to a meeting in the town hall, or helping to prepare a proposal for a local authority.

Finally, it will often be a good idea to go out together to visit some members, partly to signal the national organisation's presence among the grassroots, partly to give the head-office people an impression of rank-and-file members' views and living conditions.

### **Minutes of decisions**

To ensure that everyone knows what has been agreed, and to enable this to be recorded and entered into the monitoring system, it is important to prepare the minutes of decisions. If it is made in a simple manner, it will be possible to do so in the course of the actual visit. Annex 5 proposes a format for minutes of decisions.





## 8. The good project visit

Virtually all projects plan an annual monitoring or project visit, in which the partner from the North visits the partner in the South, or vice-versa. This contact is fundamental in bringing about trust, understanding, enthusiasm, exchange of experiences, and new knowledge. It would be very hard to build a partnership across geographical, cultural and religious divides without meeting face to face on a regular basis.

Nevertheless, there ought to be a marked difference between a project visit and an interesting study tour. An important condition for a fruitful project visit is that the project implementation tasks are clear to each party. This can be spelt out in a partnership agreement, which lays down, among other aspects, how powers and responsibilities are divided, and what the shared objectives and values are.

### 8.1 Planning a project visit

As in other areas, the key to a good project visit is planning. Prior to the event, it is important to agree on the objective, what should be examined and be done, and what outcome is expected of the visit. It will be natural for the partner from the North to draw up a document describing what the visit should lead to, what should be addressed and how. This is normally called Terms of Reference, abbreviated as 'TOR'. If the partner from the North does not prepare any TOR for the visit, there is nothing wrong with asking them to do so. With a written TOR, the objective of the visit will be clearer, and there will be greater opportunities for commenting upon the plans and suggesting changes.

What should be included in the TOR varies, but the following points might be relevant:

- Objectives: why is the project visit carried out?
- Tasks: what must be done?
- Methodology: how will it be done? The answer may be interviews, meetings and workshops, setting out who should participate.
- Outputs: should a concrete product be available after the visit? This could be a revised budget, a short report, a monitoring system, etc.
- Work plan and period: in which time interval is the visit to take place, and what is the programme?
- Participant(s): who will be on the visit?
- Documents: what needs to be read in preparation?

## 8.2 Programme

The partner from the North may offer suggestions for items on the programme, but it is natural for the partner from the South to prepare the first draft programme, and also to provide ideas to its partner from the North, given that those doing the fieldwork are most familiar with the reality on the ground. The final programme must obviously be approved by both parties.

### Monitoring

It will be natural to let the visit revolve around project monitoring. The collected information can be analysed among the partners, looking at whether it warrants any changes in the project. Particularly in the beginning, it is also an obvious idea to go through the monitoring system. Finally, it is important to examine the monitoring data to check if it is trustworthy, possibly by taking some verification samples together with the partner.

### Different levels

It will normally be important to offer the partner from the North an opportunity to get to know various levels of the organisation, i.e. from the board to local chapters, as well as any intermediate regional entities. In addition, it may be a great idea to let the visitors meet some rank-and-file members, since their living conditions are the focus of our work, and an encounter with the grassroots will, in many ways, leave a more profound impression of the organisation's work than meetings with a series of governing bodies.

### Other actors

It will often be useful for the visitor to talk to other organisations, and not only the partner. These could be public authorities, other disability organisations, or other international NGOs active in the disability field.

### Checklist

To remember addressing all necessary issues, particularly those of an administrative nature, it is helpful to prepare a checklist of everything to be examined between the partners, or conditions that



need to be investigated during the visit. This checklist should also be inserted into the TOR, so that everyone knows what to expect.

### **Exchange of views**

Just as the partner from the North may express various views as regards the performance of its partner from the South, opinions may also flow in the opposite direction. This may concern the way of cooperating, communicating etc. Any good partner will listen to constructive criticism presented in a good-natured spirit.

### **Respect organisational structures**

Important decisions are often taken during project visits, and these need to be taken by the exact body within the organisation that has the power to do so. If the partner from the North is unaware of how decision-making authority is distributed within the local organisation, this must be explained. In the event that the issue addressed is an internal matter, there is no reason to shy away from telling the Northern partner that this is a decision that will be taken internally.

### **Minutes of decisions**

Since decisions regarding the project are often taken during these visits, it is important that minutes of decisions be prepared and distributed to all parties involved.



## 9. Evaluation

### 9.1 What is an evaluation?

Just as we constantly conduct monitoring on a day-to-day basis, we also keep evaluating. If we have thrown a party, we ask ourselves and the guests how it was, what they thought of the food, atmosphere, music, etc. Perhaps the musicians hired for the event were fabulous, and can be recommended to others, whereas the food might have left something to be desired, suggesting that we should use a different supplier next time. Thus, we have carried out a minor evaluation, systematising our experiences for future use. However, we do not write anything down, and we may not ask the opinions of a representative cross-section of party-goers. Had we done so, the majority might not have been so upbeat about the music. The difference between small and ongoing day-to-day evaluations and a project evaluation is that the latter seeks to approach the issues as systematically and objectively as possible.

**Definition:** Evaluation is a systematic examination of a project's achievements compared to its planned objectives and expected outputs.

### 9.2 Why do we evaluate?

The reason that we evaluate a project is, firstly, to discover to what extent the project has lived up to the expectations. Have good indicators been designed and thoroughly monitored? This can be ascertained by scrutinising the various elements of monitoring, combining all information in order to analyse it.

Another important aim is to find out what we have learned in the course of the project. Why did it turn out as it did? Could something have been done differently? And so forth.

A final – and perhaps most important – reason to evaluate is to issue recommendations for the work ahead, regardless of whether new phases will be added to the project, or whether we need to design an entirely new intervention. A possible and crucial conclusion of an evaluation could also be that no further project work is recommended.

### 9.3 Participants

It will be an advantage to be able to call on one or several persons from outside the organisation to carry out the actual evaluation, since it will be difficult for, say, a project coordinator to deliver an objective assessment. Anyone with responsibility for implementation will, in one way or another, be closely attached to the project. If we cannot afford to hire an external consultant, we should at least consider if there is anyone within our organisation who is at arm's length from the project, and who might be able to take charge of the evaluation. Alternatively, we might invite one or several people from another organisation to do it for us.

If there are funds available to recruit several persons to take part, this is usually helpful, ensuring contributions from people with different knowledge and backgrounds.

However, to achieve a successful evaluation, it is not enough to hire a consultant. There must also be fruitful collaboration between all parties, in which everyone with a stake in the project should be able to convey their views.

### 9.4 When do we evaluate?

An evaluation is generally conducted at the end of the project. However, if the intervention runs over a prolonged period, e.g. two years or more, we may also conduct one in the course of implementation. This type of evaluation is known as a midterm review, and aims to find out if we are on the right track, and what changes ought to be made in the second half of the project.

### 9.5 Evaluation and monitoring

In order to carry out a good evaluation, it is vital that we have conducted proper monitoring of the project. The evaluation can also be conceived as an analysis of data collected during monitoring, although there is more to it than that, since an evaluation also involves interviews with the various parties about their views of the project's development and achievements.

## 9.6 TOR

Just as in the case of the project visit (see page 32), an evaluation calls for a description of what is to be evaluated and how. This is also called Terms of Reference, TOR. It is the entity deciding to carry out an evaluation that draws up the TOR.

### Background

Events leading up to the ongoing project work are briefly outlined, along with a short description of the parties involved.

### Objective

The aim of the evaluation is set out in concise terms.

### Outputs

What material is to be produced? This will primarily be a report, spelling out its length and language. In addition, draft reports, debriefing notes, and the like may also be required.

### Scope of work

This is a detailed point-by-point description of what should be examined during the evaluation. Before defining the scope, it is important first to ponder the project's weak spots. Areas of which we have insufficient knowledge, in which we might foresee some problems, and which we would like to shed light on, must also be included among the issues to be evaluated.

### Methodology

This concerns how the evaluation is expected to take place. For example, which workshop will be held? Who is to be heard? In what order should the work proceed? It should also be set out whether individual or group interviews will be conducted.

### Work plan

The work plan shows when the evaluation will be carried out, as well the deadlines to be met, e.g. when the actual fieldwork will be performed, the first draft handed in, and the final report be ready.

### Composition of evaluation team

This is a brief description of the people behind the evaluation exercise, designating the person with chief responsibility for the task.

### Documents available

Documents of relevance to the evaluation are listed here. The participants are expected to read these more or less thoroughly. If the list is long, it could possibly be attached in an annex.

What the TOR contains depends on the case at hand, but the following points tend to be included in the TOR for a project evaluation.



## 9.7 Evaluation criteria

Evaluations carried out by professional consultants often adhere to certain criteria or areas to be examined. These are internationally defined, ensuring that evaluations are presented more or less uniformly. The criteria are set out below, mostly to facilitate an understanding of the structure of an evaluation performed by consultants.

### Relevance

First and foremost, it must be examined if the project is relevant to the group that it purports to benefit. For example, a library project may be of little relevance in an area with widespread hunger, where the target group is mainly concerned with getting food. However, the concept of relevance is not confined to the target group's needs. It also relates to whether the project is in line with national policies, the partner's or donor's strategy. For example, if an organisation has the strategy of concentrating on education, a house-building project may be of limited relevance.

### Efficiency

An evaluation should investigate whether project funds have generated value for money in pursuit of planned outputs. If a building has been constructed, it is relatively simple to determine if the cost has been reasonable. It is less clear-cut when the product is 'greater awareness' or 'self-esteem', since an adequate price of such progress is hard to define. However, it is not completely impossible to judge the level of spending. For example, the cost per course participant per day is one figure to look at, and incidentally ought to be taken into account as early as planning and implementation. The evaluation should also look into whether more value for money could have been obtained by entering into alliances with other NGOs or with the various authorities. If some entities have overlapped by performing the same tasks, or if the project has dedicated resources to solving conflicts arising unexpectedly, the efficiency will tend to be low.

Even when the cheapest solution is usually preferable, more expensive approaches might still be judged favourably on account of higher quality.

### Effectiveness

It should also be examined to what degree the project has led to compliance with its immediate objectives, i.e. whether it has produced the planned development. Even when a project has trained an organisation's leaders in managing the accounts without overspending, the project's objective of transparent accounting may not have been met if, for instance, the leaders have failed to use what they have learned, or if they have left the organisation.

When good indicators have been designed and thorough monitoring been performed, it will vastly facilitate inquiries into project effectiveness.

### Impact

In an evaluation, it is important to identify the impact produced by the project. By impact we refer to all the achievements that will remain in place after the project has ended. It may also be phrased as a question: What has changed? For example, what has the project meant for the living conditions

of people with disabilities? This may refer to change in a positive as well as a negative direction, planned as well as unplanned effects.

Perhaps a training project has led to participant women being beaten by their husbands, who may have taken offence at their wives venturing outside the home. This would then be a case of an unplanned negative effect. Conversely, a training process might have had the opposite impact of empowering the women in their homes, which would then be an unplanned positive effect.

### **Sustainability**

Finally, it must be investigated whether the effects and results achieved can be expected to remain in place after the project has ended. The opposite has frequently been the case, for example, when an organisation has been set up with an office and employees, only to close down upon project completion.

**Relevance:** The extent to which the objective of a project conforms to the target group's needs, as well as to the country's and partner's strategies.

**Efficiency:** A measure of the extent to which optimal value for money has been obtained in the spending of project funds.

**Effectiveness:** The degree to which the project has succeeded in meeting its objectives.

**Impact:** The lasting changes – positive as well as negative, planned as well as unplanned – arising from the project.

**Sustainability:** The degree to which the processes started and results obtained can be expected to remain in place after project completion.



# Glossary

**Activities** Specific actions in a project carried out to produce planned outputs.

**Baseline** Data collected at the beginning of a project, marking the starting point for our indicators.

**Development objective** The long-term goals towards which the project is expected to contribute.

**Evaluation** A systematic examination of a project's achievements compared to its planned objectives and expected outputs.

**Immediate objective** The goal defined for a given project, whose fulfilment is considered to be highly likely, if the project is carried out successfully.

**Impact** The lasting effect, of a positive as well as negative nature, arising from a project.

**Indicators** Criteria defined to judge whether a project is achieving what it has been designed to achieve.

**Logical Framework Approach (LFA)** A project formulation tool.

**Monitoring** Ongoing and systematic watching over of activities and outputs.

**Monitoring plan** Plan for how the monitoring is to be carried out.

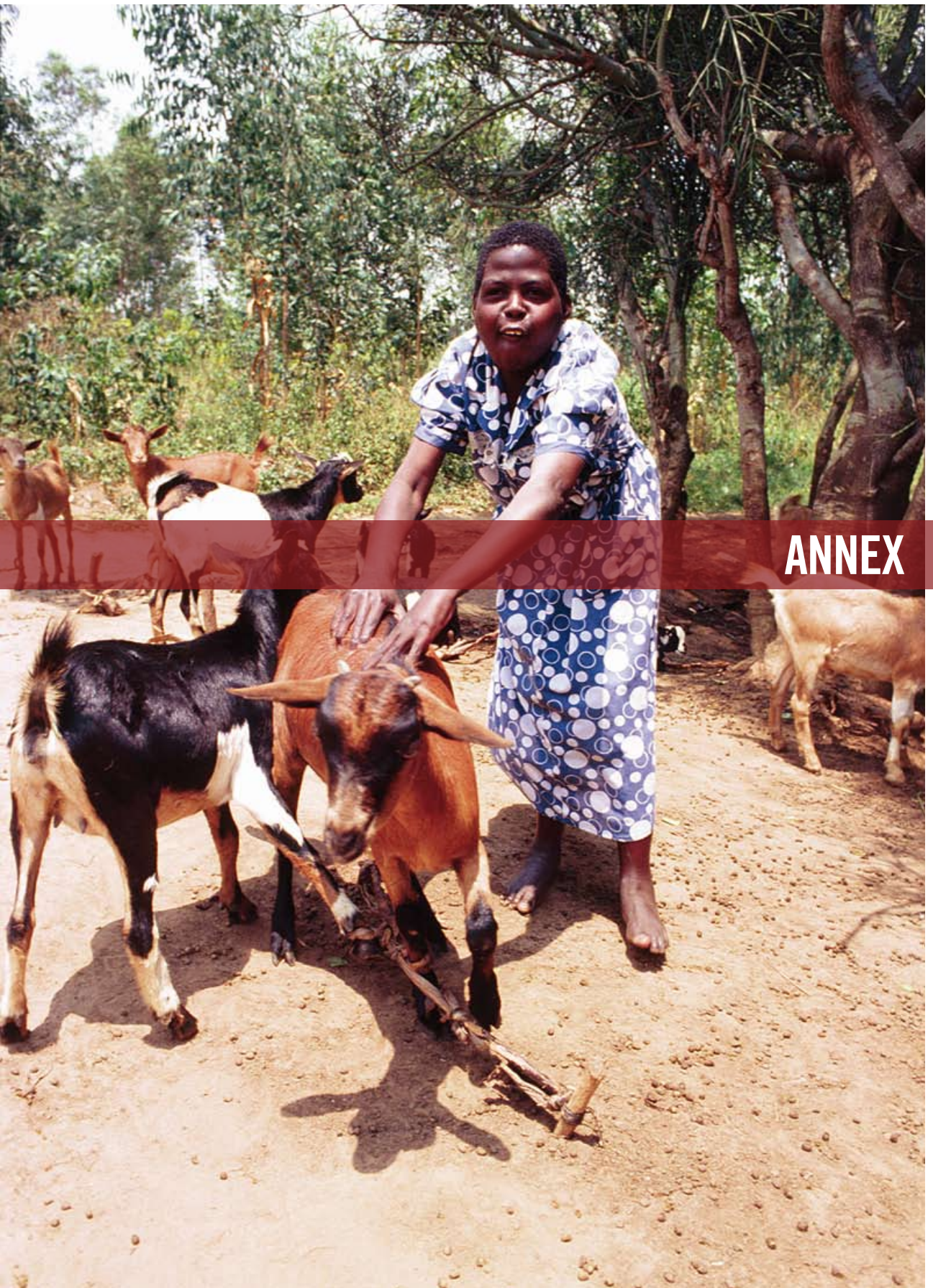
**Monitoring system** Tool for registration of collected monitoring data.

**Outputs** What the project specifically delivers as a product of its activities.

**Rights work** Activities aimed at improving living conditions by securing more rights for a particular sector of the population, such as people with disabilities. It may also be referred to as lobbying and advocacy.

**Sustainability** A project is sustainable when its achievements remain in force after its implementation has ended. Sustainability is a wide concept used in many contexts. For example, one may refer to organisational, financial and environmental sustainability.

**TOR** Terms of Reference, a paper drawn up prior to an evaluation, review, study or project visit to describe the contents, form, expected outputs etc. of the exercise.



**ANNEX**



## ANNEX 1

# Catalogue of ideas to formulate indicators – for the disability movement's development work

### Introduction

This catalogue of ideas is intended as inspiration to formulate indicators, and decidedly not to provide ready-made answers. Indicators must match the project in question, as the context will often suggest indicators more suitably reflecting the desired outcome of that particular intervention.

The catalogue is divided into sections about the various areas often addressed by disability organisations in their development work. The section about organisational development presents ideas for indicators in projects whose immediate objectives or outputs relate to organisational development, and so forth.

The percentages and numbers quoted here are invented, and it is obviously necessary to enter your own figures into the indicators. In the examples, OPD is used as the name of a fictitious organisation.

The starting point or 'baseline' is often omitted in the examples, and needs to be verified in order to make the indicators operational.

In each case, a proposed indicator is first written in italics, followed by possible comments, including whether the indicator is easy or difficult to monitor.

## ORGANISATIONAL DEVELOPMENT

**Ideas and inspiration for indicators when the project's immediate objectives and/or outputs concern organisational development.**

**1) *By 2012, OPD has drawn up a strategic plan for its organisational development.***

This is very easy to monitor. If the organisation in question has already prepared a strategic plan, the indicator could concern follow-up, evaluation or updating of the document.

**2) *For each year during the project period, OPD prepares an annual plan, which is followed up on a monthly basis.***

Easy to monitor.

**3) *By 2011, OPD has drawn up a gender strategy for the organisational work.***

Very easy to monitor.

**4) By 2010, OPD is in compliance with its own organisational statutes.**

This could be somewhat complex to monitor. It might be helpful to define exactly what criteria should be met to qualify as compliance with the statutes.

**5) By 2011, following a democratic process, OPD has changed its statutes and registered them with the relevant authorities.**

Very easy to monitor.

It could be specified what exactly is meant by “a democratic process”. In many countries, new statutes must be approved, for instance by the Ministry of the Interior.

**6) By 2012, OPD has obtained legal status in line with the laws in force in the country.**

Very easy to monitor.

What it takes to acquire legal status varies widely from one country to another. In some places, it is a lengthy and bureaucratic process, whereas in others, it can be done more smoothly. Nevertheless, in contrast to Denmark, for instance, most developing countries have certain requirements to grant this status, in addition to the passing of statutes and election of a board.

**7) By 2010, OPD holds a democratic election in accordance with the organisation’s statutes.**

This could be slightly tricky to monitor, since, for example, ‘democratic’ is a wide concept which ought to be better defined. For instance, it could be stated that election rules should first be passed, that the poll has to be secret, that the procedure must be undertaken by an independent commission, and so forth.

**8) During the project period, the Board of OPD convenes for the number of sessions prescribed by its statutes, and minutes are prepared for each meeting.**

Easy to monitor.

**9) By 2011, OPD has designated at least three committees, namely (to be specified here), which operate in accordance with their internal rules. At project start, there was one committee.**

This is relatively easy to monitor, though it could be specified how the committees expect to work, e.g. the number of meetings, project proposals, activities, etc.

**10) By the end of the project, OPD has published four annual editions of its bulletin for members.**

Very easy to monitor.

**11) By 2011, OPD has established a computer-based and up-to-date membership register.**

This is relatively easy to monitor. It could be defined what is implied by the register being up-to-date, and what information it should contain.

**12) By 2010, OPD has an auditable accounting system which complies with international accounting standards.**

This is very easy to monitor.

As regards the holding of elections, membership register, accounting system and so forth, it might be useful to set up a scorecard, where compliance with certain conditions translates into a certain number of points. This would enable assessment of overall progress towards the desired goal.

**13) By 2012, OPD has a combined income of USD/EUR 8,000 that does not come from international donors, compared to USD/EUR 6,000 in 2008, which represents an increase of 33%.**

This is very easy to monitor, if there is a good accounting scheme in place. Otherwise, it may be somewhat untrustworthy.

A good way of assessing progress towards financial sustainability is to draw up a minimum budget for the organisation, which covers the most essential core operational costs. This is compared to the amount of self-funding in terms of the organisation's own income, which gives a good picture of preparedness for the donors withdrawing support. For instance, if an organisation's activities produce an annual income unrelated to foreign aid of 13,000 USD, while the minimum budget is 16,000 USD, the degree of sustainability (basic self-funding) will be  $13,000/16,000 \text{ USD} = 81\%$ . In this case, 100% sustainability, which must be the organisation's minimum goal, is not such a long way off.

**14) By 2011, OPD has at least 5 international donors, which is an increase of 2 compared to 2009. Having an international donor is defined by the signing of a cooperation agreement and the ongoing implementation of activities funded by the donor concerned.**

Easy to monitor.

**15) By 2011, women make up at least 40% of members of OPD's Board and functioning committees, compared to 33% in 2008.**

Very easy to monitor.

**16) By 2012, OPD offers at least one cultural or sports activity to its members.**

Easy to monitor. This indicator could be used for many other types of activities that an organisation might offer, e.g. literacy teaching, training, credit, disability aids, etc.

## **LOCAL CHAPTERS**

**Ideas and inspiration for indicators when the project's immediate objectives and/or outputs concern the building and development of local chapters.**

**17) The number of local chapters of OPD has grown from 14 in 2008 to at least 20 by 2011, which represents an increase of 43%.**

This ought to be easy to monitor, although it depends on the combined number of local chapters, and how closely they relate to the main organisation.

**18) By 2012, OPD has local chapters in at least 12 of the country's 16 regions compared to a presence in 9 regions in 2008. This represents an increase of 33%.**

Very easy to monitor.

**19) The number of local chapters which have set up an office in their own, rented or borrowed premises increases during the project period from 5 in 2008 to at least 8 in 2011, which represents an increase of 60%.**

Easy to monitor.

**20) The average annual number of minutes of meetings and events drawn up by the OPD's local chapters has grown during the project period from 5.3 to at least 8, which represents an increase of 51%.**

This is slightly cumbersome to monitor, since it requires visits to at least a cross-section of local chapters. The amount of minutes will not necessarily reflect the quality of the work, but does show whether there is activity in the local chapters, as well as whether they have the capacity and established procedures to take minutes.

**21) The number of local chapters of OPD with a membership register has grown from 12 in 2008 to 18 by 2011, which represents an increase of 50%.**

This is slightly troublesome to monitor, since it requires visits to at least a cross-section of local chapters.

**22) In 2011, the annual average income earned by OPD's local chapters from their own activities is at least USD 600, which represents an increase of 27% compared to 2008, when this figure was USD 472.**

This is slightly troublesome to monitor, since it requires visits to at least a cross-section of local chapters, as well as minimally reliable accounting systems being in place in those.

**23) By 2011, women make up at least 45% of members of the boards of OPD's local chapters, which represents an increase of 25% compared to 2009, when women's share was 36%.**

Relatively easy to monitor.

**24) By 2011, 25% of local chapters of OPD are led by a chairwoman and/or vice-chairwoman, which represents an increase of 20% compared to 2009, when this share was 21%.**

Easy to monitor.

**25) By 2011, 35% of leaders from OPD's local chapters have attended OPD training courses, compared to 22% in 2009. Of the trained leaders, at least 50% are women.**

This is relatively easy to monitor, although it does require registration of trainees.

## MEMBERS

**Ideas and inspiration for indicators when the project's immediate objectives and/or outputs concern organisational development with a focus on the individual member.**

**26) By 2011, at least 5,000 people with disabilities are organised as members of OPD compared to 3,500 in 2009, which represents an increase of 43%.**

This can be troublesome to monitor in many developing country organisations, which tend to have shortcomings in their membership registration.

**27) By 2012, women make up at least 45% of OPD's members compared to 36% in 2009.**

This can be troublesome to monitor in many developing country organisations, which tend to have shortcomings in their membership registration.

**28) By 2011, 22% of members pay their subscription fee to OPD compared to 16% in 2009, which represents an increase of 37%.**

This can be highly difficult to monitor, since the head office does not necessarily know who is paying at the local level.

**29) By 2011, at least 90% of OPD's registered members acknowledge being members of OPD.**

On the face of it, this indicator may seem strange, but it provides a good idea of whether the organisation's membership register is up-to-date, and whether there are any 'ghost members'. In developing countries, membership registers are often found to include people who have died a long time ago, moved away, or simply no longer consider themselves to be members of the organisation.

**30) In 2011, at least 70% of OPD's members feel well or very well informed about the organisation's work, which is an increase of 20% compared to the 58% who felt well or very well informed in 2009.**

This indicator can be rather expensive and troublesome to monitor, since it requires a cross-section of members to be asked in a survey.

**31) By 2012, at least 55% of OPD's members express having read one or several editions of the organisation's bulletin.**

This indicator can be rather expensive and troublesome to monitor, since it requires a cross-section of members to be asked in a survey.

**32) By 2012, at least 35% of OPD's members express having attended a meeting in the organisation within the past year, which represents an increase of 20% compared to 2009.**

This indicator can be rather expensive and troublesome to monitor, since it requires a cross-section of members to be asked in a survey.



## TRAINING

Ideas and inspiration for indicators when training forms part of project activities.

**33) Two years after the end of the course, at least 20% of trainees have obtained a higher position in the organisation. For example, a rank-and-file member has become a board member, a local board member has become chairperson for the local chapter, etc.**

This is relatively easy to monitor, but it does require registration of each leader's record within the organisation. This indicator is most useful in the case of courses in organisational development and the like.

**34) Two years after the end of the course, at least 80% of trainees remain active in the organisation.**

This is relatively easy to monitor, though it does require registration of each leader's/member's record within the organisation. This indicator is most useful in the case of courses in organisational development and the like, when one objective is to foster the trainees' commitment to the organisation.

**35) At least 50% of project trainees are women.**

This is easy to monitor, but it does require registration of trainees. The same indicator can be used as regards age, type and degree of disability, ethnicity, regional origin, or whether the trainees come from urban or rural areas.

**36) By 2012, at least 33% of those trained in project design have subsequently taken part at least once in the written formulation of a project.**

This is relatively easy to monitor, but it may require some interviews with former trainees or with a cross-section of these. The same indicator can be used for other more skills-oriented courses, such as accounting, etc.

**37) At least 25% of students in a vocational sewing course have, one year after the training, used what they learned professionally, thus obtaining a certain income.**

This is relatively easy to monitor, but it may require some interviews with former trainees or with a cross-section of these. The same indicator can obviously be used for or adapted to all kinds of vocational courses.

**38) At least 80% of those who have been accepted on or invited to a course do in fact show up for training.**

Easy to monitor.

**39) At least 80% of Braille writing trainees use what they have learned regularly one year after the course.**

This is relatively easy to monitor, but it may require some interviews with former trainees or with a cross-section of these. The same indicator can obviously be used for or adapted to all kinds of teaching of disability skills.

**40) At least 30% of participants in the self-esteem course feel, one year later, that it has become easier than before the course to express themselves in front of a large audience.**

**41) At least 30% of participants in the self-esteem course feel, one year later, that they have a better relationship with their family than before the course.**

**42) At least 30% of participants in the self-esteem course are going out more frequently, and take part in social, cultural or religious events.**

Indicators 40, 41 and 42 can be rather troublesome to monitor, since they ideally require two interviews with trainees, one before and one after the course, in order to measure a change in their answers.

## **ADVOCACY**

**Ideas and inspiration for indicators when advocacy forms part of a project's immediate objectives and/or outputs.**

**43) By 2012, OPD coordinates its work with at least 6 ministries or public bodies, which represents an increase of 50% compared to 2009, when OPD would coordinate its work with 4 bodies/ministries. Coordinating its work refers to OPD holding at least two official annual meetings.**

Easy to monitor.

**44) At least 30 newspaper articles concern or mention OPD or an OPD member during the project period (2009-2012). This amounts to an annual average of 10 articles, which represents an increase of 66% compared to 2008, when 6 articles were published.**

Relatively easy to monitor.

**45) During the project period, OPD has submitted at least 4 complaints a year to the ombudsman institution.**

This is easy to monitor. Instead of an ombudsman institution, it could be a human rights commission or some other instance of appeal/complaint.

**46) By 2012, OPD is represented by at least 40 local leaders in municipal development councils. Since this is 10 more than in 2009, it represents an increase of 33%.**

This is relatively easy to monitor. Not all countries have municipal development councils, but there will often be some kind of forum in which to participate in public affairs.

**47) OPD's local chapters have submitted at least 15 written proposals for projects or other initiatives to their respective municipal councils during the project period.**

Easy to monitor. If there is a wish to measure the outcome of all proposals, it can be rephrased as an impact indicator, determining how many proposals are in fact passed.

**48) By 2012, OPD is represented on at least 6 national councils, in which disability is not the main issue. Since OPD was represented on 3 councils in 2009, this amounts to an increase of 100%.**

Easy to monitor.

**49) During the project period, OPD signs – either alone or with other disability organisations – at least 4 cooperation agreements with public authorities.**

Very easy to monitor.

**50) By 2012, representatives of OPD are present in at least 8 municipal or regional disability councils, which represents an increase of 60% compared to 2009, when OPD had representatives on 5 councils.**

**51) In the course of the project period, OPD proposes – either alone or in collaboration with other disability organisations – at least 5 legislative bills or amendments.**

Easy to monitor.

## **IMPACT INDICATORS**

**Ideas and inspiration for indicators when the project's immediate objectives and/or outputs concern advocacy.**

Impact indicators measure the lasting effect of project work as regards better living conditions of people with disabilities. They are highly useful for the organisations' rights work. Compliance with an impact indicator will often not spring exclusively from a given project, but will also depend on political will and other external factors.

This section makes a few suggestions for the various areas of disability. Countless other indicators can be identified, and these will be closely related to the types of disability and particular circumstances in each country. It will often be necessary to measure an impact indicator using official statistics, which are frequently not very reliable.

**52) By 2012, at least 6,000 children with disabilities have been included into the mainstream national school system, which represents an increase of 50% compared to 2009.**

Monitoring this indicator may run into problems obtaining reliable statistics.

**53) In 2012, the number of people with spinal cord injury dying from pressure sore does not exceed 25, which represents a decrease of 20% compared to 2009, when 31 persons died from this.**

The monitoring will depend on whether reliable statistics are available in this field.

**54) By 2012, stutterers in the Region of Tula are able to seek professional help at a newly established centre for stutterers.**

Easy to monitor.

**55) By 2012 the state is giving out free medicine in sufficient quantities to haemophiliacs, which is not the case in 2009.**

Easy to monitor.

**56) By 2012, the number of deaf people attending university is at least 22, which represents an increase of 100% compared to 2009, when 11 deaf people went to university.**

Easy to monitor.

**57) By 2012, the illiteracy rate among persons with disabilities does not exceed 48%, which represents a decrease of 6% since 2009, when it was 51%.**

This can be very difficult to monitor, and depends entirely on reliable national statistics.

**58) By the end of the project period in 2012, 45% of public buildings in the capital Daliens are in compliance with national accessibility norms, compared to 34% in 2009.**

This can be troublesome to monitor, since it requires a survey of accessibility at the beginning and end of the project. However, the results of such a study could be highly useful as documentation in the rights work.

**59) By 2010, the Republic of Zulo has ratified the UN Convention on the Rights of Persons with Disabilities, including its Optional Protocol.**

Very easy to monitor.

## ANNEX 2

# Example of TOR for project evaluation

## Terms of Reference for evaluation of the project “Organisational Strengthening” of OPD

### 1. Background

Persons with disabilities (PWD) can only be sure of improving their living conditions through processes led by their own organisations. These will consist of PWD who can identify, assess and formulate their particular disability group’s situation, needs and potentials. Through lobbying, advocacy and internal organisational activities, the organisations raise awareness and create understanding, while working towards equal opportunities and necessary services, for instance for the visually impaired in society.

In most developing countries, organisations of PWD are weak and lack resources to establish unitary national structures. Organisational set-ups and common ideas are necessary to ensure consistent outreach to politicians, authorities and external funding agencies and organisations. This makes it crucial to strengthen the organisations of PWD.

The Danish Association, DDO, has been collaborating and supporting OPD, for the past 15 years. This collaboration has led to the establishment and strengthening of a dynamic and well-structured organisation, which is gaining influence at many levels of society. Currently, DDO is supporting OPD through a model project of community-based rehabilitation aimed at offering training, support and back-up to persons with disabilities from the organisation at national, regional and district levels.

OPD has a Youth and Student Wing. This semi-independent structure primarily works with issues pertaining to youth and education. The wing attempts to gain influence at schools, create awareness, as well as organise activities to empower young persons with disabilities in the country.

Prior to the project for evaluation, long-standing collaboration between DDO and OPD had shown that the wing required strengthening of its capacity in order to meet the needs of its members. Bearing in mind that young people are tomorrow’s organisational leaders and that OPD is in a process of general capacity building through its projects with DDO, strengthening of the Youth Wing was given priority. Through Disabled People’s Organisations Denmark, DPOD, DDO secured funding for the project “Organisational Strengthening of the Youth Wing of OPD”. The immediate objectives of the project were:

- By 01.01.09, two (2) new regional branches in Dazo and Dali and the two (2) regional branches in The Northern Region and The Central region operate in an improved manner.

- By 01.01.09 The National Secretariat of the Youth Wing in Renu operates with improved efficiency and maintains regular contact with the OPD Headquarters to strengthen the collaboration in all major undertakings in general including the on-going project activities.
- By 01.01.10, the Youth Wing has a thoroughly debated and approved strategy for its organisational work valid until 31.12.2012.
- By 01.02 2009, OPD has an improved understanding of how to keep strengthening the organisational capacity of the Youth Wing in the best and most efficient way.

## 2. Objective of evaluation

The objective of the evaluation is to assess the project impact and implementation and to consolidate lessons learnt in the Republic of Masa as well as in Denmark with a view to determining whether an extension of the project within the current or a new framework is relevant and realistic.

## 3. Output of evaluation

- A final report in English of maximum 20 pages plus annexes
- A debriefing note of maximum 4 pages
- An executive summary of maximum 2 pages

## 4. Scope of work

The evaluation report must provide an overall assessment of the extent to which the project objectives have been reached, including:

- Project design. How was the project designed and by whom? Could the design and planning process have been different?
- The relevance of the activities: In the context of the Youth Wing, do the activities seem relevant and in tune with needs and priorities? Would other activities have strengthened the organisation as a whole in a more effective way?
- The efficiency of the activities: Have the activities been carried out in accordance with what was agreed in the project document? If not, why not?
- The effectiveness of the activities: To what extent have agreed objectives been reached? Are the activities sufficient to realise agreed objectives?
- The output and impact of the activities: What are the positive and negative effects and do positive effects outweigh negative effects?
- The sustainability of the activities: Are the involved parties willing and able to keep facilities operational and to continue on their own? And what could be done to ensure a higher degree of sustainability? How can the involved parties be further motivated to continue on their own instead of relying on external assistance?
- Has participation in project activities been gender balanced? If not, how can gender balance be ensured in future activities?

In relation to the four immediate objectives, the following points should be addressed in the evaluation:

- What has been the impact of the project in the two new branches in Dazo and Dali regions and in the strengthened branches in the Northern and Central regions?
- Does the Youth Wing's secretariat in Renu operate in a satisfactory manner, and has the communication internally in the wing and between the wing and the OPD secretariat and leadership improved with the project? If yes, what is the impact of the improved communication?
- Has the leadership of the Youth Wing at regional and national levels been strengthened? And how?
- Has a realistic long-term strategy been established for the Youth Wing? If not, why not?
- Has OPD gained an increased understanding of the work and capacity of the Youth Wing? Has communication and collaboration between OPD and its young members improved during the project period? If yes, how? If not, why not?

The evaluation report should explain reasons for successes or failures and capture lessons learnt. The report should contain suggestions for future improvements in the activities of the Youth Wing.

## 5. Methodology

An initial desk evaluation will be based on project documents, documents produced for project activities and events, project reports, annual reports, strategies and financial statements. At the end of January 2009, the evaluation team will meet with members, employees and executives of the Youth Wing, as well as with representatives of OPD's leadership and secretariat in order to learn – through interviews and informal discussions – about practical project implementation and impact. Key evaluation activities will include:

- Meeting with the executive of the Youth Wing.
- Visit to/meeting with the present, and if possible former, office clerk at the newly established office of the Youth Wing in Renu.
- Visit to/meeting with members of the newly established branches of the wing in Dazo and Dali regions.
- Visit to/meeting with members of the strengthened branches in Northern and Central regions.
- Meetings with OPD secretariat and leadership.

A debriefing note will be discussed with representatives of OPD at the end of the evaluation visit.

## 6. Work plan

The initial desk evaluation will start in December 2008

Fieldwork will be carried out in January 2009

By 29 January 2009, the evaluation team will submit a debriefing note to OPD and DDO

The first draft report will be submitted to OPD, DPOD and DDO no later than 15 February.

The final evaluation report must be submitted to OPD, DPOD and DDO no later than 1 March 2009.

## 7. Composition of evaluation team

The evaluation team will consist of Mr Jens Jensen (chief of mission) and Mrs. Christina Koray. Gitte Nielsen from DDO will participate as resource person.

## 8. Documents available

- Project document
- Project matrix
- Budget
- Report to DPOD 2007 and 2008
- Quarterly reports to DDO
- Gender study, 2007
- Strategic plan for OPD, 2006
- Annual work plan for Youth Wing 2006, 2007 and 2008



## ANNEX 3

## Suggested format of questionnaire to register individual project participants (in training, credit, education, etc.)

This example has been designed for an organisation of people with physical disabilities, but can clearly be adapted to any organisation.

Questionnaire for participants		
Name: _____	Age: _____	Sex: _____
Domiciled in region: _____		
Municipality: _____	Village: _____	
Exact address: _____		
ID number: _____		
Educational level: _____	Employment situation: _____	
<b>Type of disability</b>		
<input type="checkbox"/> Has no disability		
<input type="checkbox"/> Hemiplegia	<input type="checkbox"/> Muscular atrophy	<input type="checkbox"/> Amputation of arm/hand
<input type="checkbox"/> Paraplegia	<input type="checkbox"/> Rheumatism	<input type="checkbox"/> Amputation of both arms/hands
<input type="checkbox"/> Tetraplegia	<input type="checkbox"/> Congenital deformity	<input type="checkbox"/> Disability caused by accident
<input type="checkbox"/> Polio	<input type="checkbox"/> Amputation of legs	
<input type="checkbox"/> Cerebral palsy	<input type="checkbox"/> Amputation of both legs	
<input type="checkbox"/> Other: Describe _____		
<b>Degree of disability</b>		
<input type="checkbox"/> Light <input type="checkbox"/> Medium <input type="checkbox"/> Severe		
Do you use any assistive devices/aids? <input type="checkbox"/> No <input type="checkbox"/> Yes    Which _____		
Signature: _____ Date: _____		



## ANNEX 5

## Format for follow-up visit to local chapters

Date: \_\_\_\_\_ Organisation: \_\_\_\_\_ Local chapter: \_\_\_\_\_

### Participants

Name:

Signature:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

6) \_\_\_\_\_

7) \_\_\_\_\_

8) \_\_\_\_\_

### Objective of visit:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

### Agreements and/or division of tasks:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Agreements and/or division of tasks:

\_\_\_\_\_

\_\_\_\_\_


## ANNEX 6

## Example of Programme for project visit to the organisation OPD

### Participants from Denmark: Pia Sørensen (PS) and Dan Knudsen (DK)

Date	Hours	Activity	Participants
<b>Day 1</b>	8.00 – 12.00	Meeting with project personnel and chairman of partner from the South, going through TOR, programme and initial deliberations on the project's current state	Project personnel, chairman, Pia Sørensen (PS) and Dan Knudsen (DK)
	13.00 – 15.00	Meeting with accounting department	Book-keeper and PS
	13.00 – 15.00	Meeting with person responsible for monitoring	Person responsible for monitoring and DK
	15.00 – 17.00	Meeting with auditor	Auditor and PS
	15.00 – 17.00	Meeting with person responsible for training in the project	Person responsible for project and DK
<b>Day 2</b>	6.00 – 12.00	Transport to northern province	Project employee (PM), PS and DK
	13.00 – 14.30	Meeting with board of local chapter in Dazu	PM, local board, PS and DK
	15.00 – 17.00	Visit to members	PS and DK
<b>Day 3</b>	7.00 – 8.30	Transport to local chapter in Kanu	PM, PS and DK
	8.30 – 10.00	Meeting with board of local chapter in Kanu	PM, local board, PS and DK
	10.00 – 12.00	Visit to members	PS and DK
	13.00 – 14.00	Meeting with mayor of Kanu	Chairman of local chapter, PM, PS and DK
	14.30 – 15.30	Meeting with the international NGO DAO	PS and DK
	16.00 – 17.30	Meeting with representatives of disability organisations present in Kanu	Organisational representative, PS and DK
<b>Day 4</b>	6.00 – 12.00	Transport to capital	PM, PS and DK
	13.00 – 15.00	Meeting with rehabilitation council	PS and DK
	15.30 – 18.00	Meeting with project personnel about impressions from visits to local chapters	Projectpersonnel, PS and DK
<b>Day 5</b>	9.00 – 10.00	Meeting with rehabilitation council	PS and DK
	10.30 – 12.00	Meeting with the international NGO FS	PS and DK
	13.00 – 15.00	Meeting with chairman of the umbrella organisation	PS and DK
	15.30 – 18.00	Preparation of workshop	Projectpersonnel, PS and DK
<b>Day 6</b>	9.00 – 17.00	Workshop with representatives of local chapters and board regarding a preliminary project evaluation	
<b>Day 7</b>	Day off		
<b>Day 8</b>	8.00 – 9.00	Meeting with Danish embassy	PS og DK
	9.30 – 12.00	Meeting with the national board	Board, PS og DK
	13.00 – 16.00	Final meeting with project personnel, including going through minutes of decisions arising from project visit	Projectpersonnel, PS and DK
	18.00 –	Goodbye dinner	Projectpersonnel, board, PS og DK
<b>Day 9</b>		Departure to Denmark	





The realm of development aid is full of professional and technical terms. These include monitoring and evaluation. What actually is monitoring and evaluation, and how can systematic monitoring improve development work? That is what this manual sets out to answer.

In a reader-friendly way, the manual offers orientation and guidelines to monitoring throughout the various project phases, from planning to implementation. At the same time, the manual provides inspiration for particular areas of monitoring, such as project visits, reporting, evaluation and indicator formulation.



**Disabled People's Organisations Denmark, 2009**

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