Criteria for assessing projects during monitoring visits

Monitoring is a continuous function that aims primarily to provide REF officers and main stakeholders with regular feedback and early indications of progress or lack thereof in the achievement of intended results. Monitoring tracks the actual performance or situation against what was planned or expected according to predetermined standards. Monitoring generally involves collecting and analyzing data on implementation processes, strategies and results , and recommending corrective measures.

Criteria for rating the progress made in the project

1. The progress towards outcomes - analyzing to what extent intended outcomes have actually been achieved or are likely to be achieved;
2. The factors contributing to or impending achievements;
3. The implementation of the project to ensure progress and that outputs are being produced as planned and are contributing to the outcomes; (using judgment and balance to ensure that one does not get bogged down in too much detail)
4. The partnership strategy to ensure a synchronized approach to the project.
5. reporting/analyzis - obtaining and analyzing documentation from the project that provides information on progress. Checking or verifying whether the reported progress is accurate or not
6. Participation - obtaining feedback from partners and beneficiaries on progress and proposed actions

A **good practice** is one where there is evidence that it is effective at delivering a particular outcome when applied to a particular condition or circumstance s in the country. We have to think about the country context and how the implementer has tried to reach the outcomes in the given context. Good practices can also be defined as the efficient and effective ways of accomplishing a task, based on repeatable procedures that have proven themselves over time for large numbers of people. A good practice may be a project or a component of a project.

A given good practice is only applicable to particular condition or circumstance and may have to be modified or adapted for different circumstances. However, it is expected that in the new circumstances, assuming they are sufficiently similar to the original circumstances, the practice can be effective. The term may imply that the good practice is not universal, but depends on the specific situation (for instance desegregation models) .

[1] A best practice would be more effective than any other project.

This synthesis rating reflects a judgment of a overall quality of the project due diligences and value added to each stage of operations for project development.

Unsatisfactory practices: is failure to implement successfully a defined percentage of the activities (agreed in the PIPs), or not building the premises for reaching the objectives. Most performance requirements are not met

The services are not in place although the budget lines for them have been spent. A project can be rated as unsatisfactory if the monitoring team discovers misused of funds such us: give cost impact; loss of capability for implementer; ineffective corrective actions suggested in previous monitoring visits; Unsatisfactory invoicing/reporting practices; Not likely to recover the misused funds;

Performance does not meet the requirements set forth in the agreement and recovery is not likely in a timely or cost effective manner. The phase or deliverable contains serious problem(s) for which the implementer's corrective actions appear to be or were ineffective. Also a unsatisfactory practice could be considered a project that has reached less than **50% (if you agree)** of the envisaged target group and the quality of services does not correspond with the initial plan. The implementer did not possess and demonstrate adequate technical and procedural know -how to complete project.

Monitoring Report

1. **Introductory section**

   What recommendations were made during the last monitoring mission regarding this project? Have they been implemented?
   Have there been other developments in the country/community context which are significant for the project (either because they have had or could have an impact on the project)?

2. **Project development/ Objectives**

In this section we need to assess if the applicant succeeded to develop premises for reaching the objectives.

Are the benefits/services that the target groups suppose to receive in place?
Quality of products, focused on outcomes. Project Issues; Project Changes; Milestones; Accomplishments achieved during this reporting period;
What has gone particularly well during this monitoring period?
Suggestions from the monitoring team that would help the implementer to reach the objectives should be included in the report.
Follow up.

2. Project Implementation Plan

Here the project officer should assess the implementation of the PIP2 and looking on the sequences of the activities.

The most important thing is to appraise if the implementer succeeded to implement activities in relation with the project objectives.
What has gone particularly well during this monitoring period?
What problems have occurred during this monitoring period? What impact have they had on the project? What impact are they likely to have on the project future?
Have the activities produced the results (outputs) that will lead to project outcomes? (Quantity, quality, time).
What has changed in the way that your institution and other project beneficiaries operate as a result of these activities? How have they been addressed / rectified?
Follow up

3. Project Stakeholders Involvement

In this section the project officer should asses s if the stakeholders that are outlined in the proposal have been participating in active manner to the project activities.

What were their contributions?
Also, during the mission the project officer should mention the other stakeholders met during the mission (possible supporters such other donors that are interested in education) but are not direct involved in the project.
Are project beneficiaries and management aware of the project's progress?
Follow up

4. Project Monitoring and Evaluation

In this paragraph the project officer should mentioned the instruments developed by the applicant to measure the indicators and the outcomes lined in the PIP1. Collecting information, reviewing the information collected, and following up on identified problems

How does the implementer measure the progress at the activities level as well at the objectives level?
How is progress towards the achievement of the project's objectives and goal tracked?
Please specify which set of indicators is being utilized to measure progress. Has an updated PIP1 table been discussed with the implementer?
The list of REF indicators should be tracked during the monitoring mission.

5. Overall Assessment

Is this project as a whole or are elements of the project good practice?

Is this project as whole or are elements of the project unsatisfactory?

Are there particular things that need to be watched during the next monitoring period which have a significant positive or negative effect o n the likelihood of achieving the objectives?

Other aspects to be observed (your comments suggestions are welcomed)

1. What is the number of Roma students enrolled in the school? What is their rate against the total rate of the children enrolled?
2. Where the school includes just Roma students, what is the distance between this school and the nearest mixed school? Is there a public access road to the mixed school? And is there any school or public transport?
3. Are disadvantaged group children and parents represented in the school management such as the Parents or Students Councils?
4. Do the school mediator and teachers work alongside families to encourage school enrolment in due course?
5. Does the school have a plan for any late enrolment so as to avoid segregation?
6. Are the causes of student drop -out always investigated and checked?
7. Do all students have equal access to books, manuals and other teaching materials available?
8. Has the school management established links with and regularly consults local authorities, NGOs and other institutions able to support school efforts to meet the needs of disadvantaged students, including Roma?