



PD-ABF-697

SN 81944

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ATLANTIC RESOURCES CORPORATION

**MONITORING AND EVALUATION  
FIELD TRIP**

**WEST BANK AND GAZA STRIP,  
FEBRUARY 8-26, 1993**

**Prepared for:**

**Agency for International Development  
NE/ME/WBG  
Room #102  
SA-2  
Washington, D.C. 20423-0229**

**Contract Number: HNE-0159-C-00-2060-00**

**April 1, 1993**

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## ACRONYMS AND GLOSSARY

ACDI	Agricultural Cooperative Development International
A.I.D.	Agency for International Development
AID/W	Agency for International Development/Washington, D.C.
AMIDEAST	American Middle East Education and Training Services
ANERA	American-Near East Refugee Aid
CDP	Cooperative Development Project
CRS	Catholic Relief Services
ESL	English as a Second Language
ESP	English for Special Purposes
MIS	Management Information System
M&E	Monitoring and Evaluation
NGO	Non-Governmental Organization
PRA	Participatory Rapid Appraisal
PVO	Private Voluntary Organization
RD	Rural Development
RD III	Rural Development III Project
IRD/CB	Rural Development Capacity Building
SAR	Semi-Annual Report
SCF	Save the Children Federation
SCH	Society for the Care of the Handicapped
SPSS	Statistical Package for Social Sciences
TA	Technical Assistance
TWI	Training Within Industry
VAT	Value-Added Tax
VHSTP	Village Health Service Training Project
VTC	Vocational Training Center
WB/G	West Bank/Gaza
WP	WordPerfect
YMCA	Young Men's Christian Association

## **EXECUTIVE SUMMARY**

### **INTRODUCTION**

The consultancy described in this report was part of a continuing effort under a U.S. Agency For International Development (AID) contract to Atlantic Resources Corporation to improve monitoring and reporting of seven AID-funded Private Voluntary Organizations (PVOs) operating in the West Bank and Gaza Strip. The consultancy took place between February 8 and 26, 1993, at various PVO offices in Jerusalem and the region. During the first two days of the consultancy a workshop was held on logframe development and AID reporting requirements. The workshop focused on the logframe and its use in planning, monitoring and evaluation and proposed revisions to the semi-annual reporting (SAR) guidelines. Consultants then worked with individual PVOs to answer questions regarding material presented in the workshop, to finalize logframes for their projects so as to provide the basis for SAR reporting, to assist them in developing targets for indicator reporting, and to answer questions and elicit reaction to the proposed revisions to the SAR guidelines.

### **TARGETED PVO CONSULTANCIES**

Four PVOs were targeted for extensive help in project monitoring:

- Cooperative Development Project,
- American Near East Refugee Aid,
- Catholic Relief Services, and
- American Middle East Education and Training Services.

### **Cooperative Development Project (CDP)**

CDP has been working to develop a monitoring system since the Devres evaluation first identified its monitoring weaknesses in late summer 1992. Work has focused on articulating CDP objectives and outputs, determining effective ways of measuring progress, and developing a data collection system for key indicators. Although the process has been long and arduous, it has produced a realization of the need for a system to measure performance, not merely to satisfy AID reporting requirements. CDP staff has also improved its understanding of logframe terminology and methodology, and recognized the need for regular monitoring and data collection for management. The CDP logframe has been finalized with indicators at both the purpose and output levels and targets have been established for all indicators.

The next step for CDP is to establish an automated system to enter, store, and retrieve indicator and other monitoring data. CDP has indicated that it lacks in-house expertise to design and set up such a system and has requested assistance under this project.

## **American-Near East Refugee Aid (ANERA)**

Work with ANERA began with discussions regarding ANERA's current strategy, planning and operational concerns, reporting needs, and future directions. From these discussions, a new comprehensive objective tree was drafted and presented to ANERA's staff for review and modification.

The consultant and ANERA identified that ANERA currently operates a comprehensive "rolling-plan" program rather than a discrete, pre-defined project. Consequently, the summary logframe developed is more a conceptual framework of an institutional strengthening process than a description of substantive sectoral, site or institution-specific development assistance. Moreover, not all of ANERA's activities are directed at institutional strengthening and many objectives are actually obscured by this vague definition. The current logframe does not provide, from AID's perspective, adequate data for purpose level monitoring.

A more appropriate long-term solution and one endorsed by AID is for ANERA to shift its rolling program approach to a more narrowly focused project with specific, integrated objectives and a pre-defined set of activities. Although a complete restructuring of the project is impractical, Atlantic Resources Corporation recommends that a consultant work with ANERA to develop a set of indicators for the current project that AID thinks is appropriate for its oversight needs, and is also useful for ANERA's internal management.

Overall, the consultant rated the efforts at ANERA as reasonably successful. ANERA personnel appeared interested in improving their existing system for internal use as well as for reporting to AID; some basic technology transfer occurred in terms of objective tree preparation, logframe development, and PERT/CPM network construction for milestone progress reporting. Further work is needed to define a data collection procedure.

## **Catholic Relief Services (CRS)/Integrated Rural Development Capacity Building (IRD/CB)**

CRS is redesigning a proposed Integrated Rural Development Capacity Building Project. The consultant's work focused on helping the staff better plan and integrate project components using the logframe methodology. A logframe has been produced, but is incomplete and requires further work. In addition, the logframe design is broad and includes a health component which AID may wish to reconsider in light of the CRS health project that is already being funded.

Although the Participatory Rapid Appraisal (PRA) and training needs assessment were also examined, the consultant's recommendations were inconclusive. Further work is required to finalize these instruments. Atlantic Resources Corporation recommends that the entire data collection system for IRD/CB be maintained in-house and that any skill transfer to local counterparts occur only after CRS has demonstrated competence, and then only if warranted by project objectives. IRD/CB personnel have requested assistance in project scheduling and planning.

## **American Middle East Education and Training Services (AMIDEAST)**

AMIDEAST faces two major problems in project monitoring. First, its AID-funded project currently provides training for individuals within organizations and as such is activity oriented. It is therefore difficult to develop an integrated objective tree with purpose and outputs. Second, AMIDEAST has never monitored the impact of its training activities either in terms of the quality of training, or the impact on the trainees and/or the organizations with which they work.

Discussions with AMIDEAST revealed that they plan to restructure their AID project with an institutional strengthening focus. The upcoming Atlantic Resources Corporation consultancy date should assist AMIDEAST in the project design phase by utilizing the logframe methodology as a planning tool. A carefully designed project would provide the basis for effective monitoring and reporting. In addition, AMIDEAST will need assistance to develop methods to measure the impact and quality of their training activities. AMIDEAST has requested a training evaluation specialist to provide such assistance.

## **NON-TARGETED PVO WORK**

### **Introduction**

Visits with non-targeted PVOs focused on logframe review and finalization, discussion of indicators to measure progress on project purpose and outputs, discussion of targets for those indicators against which progress would be measured in the SAR, and the data collection methods that would be used to gather information for reporting. It was assumed that with the considerable work Atlantic Resources Corporation had done on the logframes for the YMCA, SCF, SCH, and the CRS Village Health Project and the individual work sessions to refine logframes, that most of the work would be completed and discussions in the individual PVO meetings could move on to setting targets and data collection. Unfortunately, this was generally not a valid assumption and considerably more time than originally planned was needed to finalize the logframes.

### **Young Men's Christian Association (YMCA)**

The YMCA staff spent considerable time between the workshop and the consultant visit finalizing their logframe, so minimal time was required for discussion of purpose, outputs, and indicators. The YMCA staff has a good understanding of the logframe process and the importance of monitoring as part of project management. AID reporting will not place additional burdens on them since they collect most of the information for internal monitoring. It is not anticipated that any further work in project monitoring will be required for the YMCA.

### **Save The Children Federation (SCF)**

SCF has a sound understanding of project monitoring and a comprehensive procedure for data collection for monitoring. The major problem faced by SCF with regard to AID monitoring is that only 23 percent of their funding is derived from AID; these funds are not isolated by component or activity. This fact makes impact evaluation of AID funding nearly impossible. It also dulls their interest in spending a significant amount of time in developing logframes and indicators and special measurement efforts for AID reporting.

The logframe for SCF is not complete. The current logframe has five outputs that all lead directly to the purpose. Indicators chosen at the output level will accurately reflect progress toward the project outputs and thus toward the purpose. At this point, however, SCF has not developed a purpose level indicator to measure the impact of their project. The means of verification and assumptions are also not complete. Considerable discussion focused on the development of a purpose level indicator. Atlantic Resources Corporation suggested to SCF that they develop an index to measure self-reliance in their target areas and that they measure progress against this index.

### **Society For The Care of The Handicapped (SCH)**

The November assessment of SCH's monitoring system concluded that SCH monitored and documented activities and progress carefully. However, most of what SCH was reporting to AID was not useful. Consequently, discussion with the SCH Director was directed at obtaining agreement on definition of purpose and output objectives and indicators for reporting progress toward those objectives. SCH currently gathers data on all indicators in the new logframe. Because most of the data are stored in Project Manager's hard-copy files, SCH intends to create a computer program for storing this data to expedite SAR reporting.

SCH still does not have sound grasp of logframe methodology. In view of this, Atlantic Resources Corporation has offered assistance to SCH to help them construct a logframe for the hearing impaired component. Also, in light of past weaknesses in semi-annual reporting, SCH will need assistance in preparing the SAR under the new guidelines.

### **Catholic Relief Services (CRS)/Village Health Training Services Project**

This project suffered from the outset from inadequate planning for both implementation and monitoring. To expedite progress, a draft logframe was prepared by Atlantic Resources Corporation and presented to the project manager for comment. The logframe incorporated AID comments both on the CRS baseline health survey and on initial indicator selection and drew primarily from the exhaustive list of indicators prepared by the project manager and CRS health consultant. Atlantic Resources Corporation consultants worked with the project manager to finalize the logframe and obtain agreement on indicators for monitoring progress.

CRS now has fairly reliable baseline data on purpose level indicators. However, it lacks an understanding of the usefulness of the logframe and the importance of regular data collection for monitoring performance. CRS still has no plans to gather purpose level data until the end of project, believing that purpose measurement will require a repetition of the costly, overblown baseline survey. The project manager was asked to plan a small scale survey to measure purpose indicators, and to demonstrate to Atlantic Resources Corporation and AID the methodology of this survey.

CRS could benefit from direct assistance to improve its project planning, scheduling, and management capabilities. A consultant could work directly with the health project manager to: examine the annual implementation plan and address any deficiencies, train the project manager in planning/management techniques, and review and streamline the data collection/storage system.

### **SEMI-ANNUAL REPORT REVISIONS**

Proposed revisions in the SAR guidelines were presented at the workshop and lengthy discussions were held with each PVO to obtain feedback on the proposed revisions, and on general SAR issues. All PVOs welcomed the revisions and unanimously indicated that they felt the new guidelines are simpler and clearer.

In the course of the PVO discussions on the SAR revisions, several issues arose that required clarification. These issues have been addressed and resolutions incorporated into the SAR guidelines as appropriate. They include: the timing and timeliness of the SAR, VAT and customs recovery, financial reporting, gender equity, and reporting on overlapping projects.

### **PVO SUGGESTIONS TO IMPROVE AID PROGRAM**

Prior to departing for Jerusalem, the consultants were asked to seek suggestions from PVOs on what AID/Washington and AID/WB/G could do to improve planning, monitoring, and reporting requirements, and overall information flow for PVO projects. A number of suggestions were offered, with a great deal of similarity among the PVOs. AID will address these issues with the PVOs, although a specific format has not been established.

### **MONITORING SYSTEM FOR AID/WEST BANK/GAZA**

Two issues arose in early discussions with the AID/West Bank Monitor that were not included in the scope of work for the consultancy, but which were seen to be of critical importance to effective monitoring and were therefore addressed to the extent possible.

The first of these was the continued confusion in terminology among the PVOs and between AID and the PVOs. To obtain standard terminology, a diagram of project structure was drawn up for each PVO with specific illustrations of the use of terms including "program strategy," "PVO grant/project," "component," "subcomponent," "activities," and "activity sites." Both the PVOs and the AID monitor indicated that these diagrams will be helpful in eliminating confusion in terminology, however the length of time taken to prepare the charts, and the fact that even now some of the

information remains to be completed, is a strong testimony to the degree of confusion that exists. It is recommended that these project structure diagrams be included in PVO proposals so that, from the start, terminology is clear.

The second issue that arose in initial meetings with the AID West Bank Monitor was the need to develop a system to enhance the monitoring of PVO projects in the field. Discussions about that system led to the production of a draft system design. The basis for the database will be semi-annual activity reporting by PVOs in accompaniment to the SAR. Electronic input of data from PVOs will be built into the design, thus reducing or eliminating the need for paper reporting on activities. A consultancy is scheduled for the end of April/early May to complete the design and implement the activity monitoring system.

## **SUMMARY, CONCLUSIONS, AND NEXT STEPS**

*All team members agreed that tremendous progress was made during the three weeks in Jerusalem on increasing general understanding and acceptance of monitoring methodology. Most PVOs exhibited a growing understanding of the use and usefulness of the logframe as a management tool. Most PVOs now see the need to monitor their projects internally to promote effective management. Many PVOs have asked for help in setting up manual and/or automated systems to enhance their project monitoring. Care should be taken to allocate the limited resources of the West Bank/Gaza Monitoring Project to those activities and/or PVOs most in need of attention, but it is imperative that the initiative that has begun continue. Tasks to continue the momentum for each PVO are detailed in the report.*

## **A. INTRODUCTION**

The consultancy described in this report is part of a continuing effort under a U.S. Agency For International Development (AID) contract to Atlantic Resources Corporation to improve monitoring and reporting of seven AID-funded Private Voluntary Organizations (PVOs) operating in the West Bank and Gaza (WB/G) Strip. The consultancy took place between February 8 and 26, 1993, at various PVO offices in Jerusalem and the region. A previous trip, conducted in October-November 1992, assessed the quality and effectiveness of PVO project monitoring systems. The findings of that trip provided, in large part, the basis for the design of this consultancy.<sup>1</sup>

One of the key findings of the initial monitoring assessment was that many PVOs, even those with relatively good monitoring systems, were unfamiliar with the terms used by AID in monitoring and evaluation, specifically those related to the logical framework. Some PVOs, for example, did not understand the difference between outputs and purposes, or purposes and goals. Moreover, consultants working in the region used the terms inconsistently or did not themselves understand them, thereby adding to the prevailing confusion. A more serious problem was that some PVOs did not understand how to develop and use the logframe as a management tool in the project cycle; indeed, some project managers viewed, and continue to view, the logframe as an idiosyncratic AID device that is not relevant to effective project design and management. A third obstacle was that some PVO strategies were unfocused and their activities unintegrated, making the development of meaningful indicators to measure project progress difficult. As a result of these and other problems, projects did not have clear objectives or indicators to measure progress, and monitoring for both PVO planning and AID reporting was largely ineffective.

However, poor PVO reporting was not solely a function of inadequate monitoring systems. Subsequent to the November field trip, the guidelines for the Semi-Annual Report (SAR) to AID were examined and found to be vague, confusing, and in some cases impractical.<sup>2</sup> To improve the guidelines, revisions were drafted that aimed to improve the connection between the SAR and the logframe as the basis for reporting, clarify ambiguities, create an improved reporting structure, and provide matrices to standardize reporting on expenditures and indicators.

During the first two days of the consultancy (see Appendix A for schedule) a workshop was held on logframe development and AID reporting. The first day and a half focused on the logframe and its use in planning, monitoring, and evaluation; the final session targeted the proposed revisions to the SAR guidelines.

In the two and a half weeks following the workshop, Atlantic Resources Corporation consultants worked with individual PVOs to answer questions PVOs had about material presented in the workshop, finalize logframes for their projects which would provide the basis for SAR reporting, assist them in developing targets for indicator reporting, and answer questions and elicit reaction to the proposed revisions to the SAR guidelines.

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<sup>1</sup>See **A STUDY OF MANAGEMENT INFORMATION SYSTEMS OF AID-FUNDED PRIVATE VOLUNTARY ORGANIZATIONS IN THE WEST BANK AND GAZA STRIP: FINAL REPORT**, Prepared for AID, Washington, D.C., December 22, 1992.

<sup>2</sup>Guidelines for the SAR form part of the "Special Terms and Conditions" of the Grant Agreement.

As a result of the earlier assessment of PVO monitoring systems, four PVOs were targeted for extensive assistance in project monitoring, and consultants were assigned to work directly with them for the remainder of their time in Jerusalem: ANERA, (Kenneth Smith), CRS/IRD-CB (Sandra Bertoll), and ACDI/CDP (Ken Lizzio). AMIDEAST was also targeted for extensive assistance, but a formal, external evaluation of the AMIDEAST project had been planned for February, so work with that PVO was confined to discussing their needs for a monitoring consultancy in April. Susan Exo, the team leader, and Ken Lizzio worked with the remaining four PVOs: the YMCA, Save The Children Federation (SCF), Society for The Care of The Handicapped (SCH), and the Catholic Relief Services (CRS) Village Health Project.

Over the course of the three week field trip, the consultants met regularly to discuss problems, exchange ideas, and coordinate activities.

Finally, considerable time was spent establishing a common understanding of such terms as "program," "project," "component" and "activity" in order to facilitate communication between AID and the PVOs, and to clarify at what project level PVOs would report to AID/Washington, D.C. (AID/W) and to the AID/Jerusalem field monitor. The need for a monitoring system for the AID/West Bank field monitor was also discussed, and initial specifications of the monitoring system were designed.

During the three weeks of the consultancy, PVOs exhibited a growing understanding of the use and usefulness of the logframe as a monitoring tool. In addition, and perhaps more important, all PVOs now appear committed to monitoring as an important aspect of project management. A number of past differences with AID were discussed, and PVOs provided a number of comments and suggestions to improve AID/PVO relations.

In the report that follows, the activities of the consultancy are presented in detail. In the case of two of the targeted PVOs, ANERA and CRS, the comments of the consultants assigned to these PVOs are presented followed by comments of Atlantic Resources Corporation.

## **B. TWO-DAY MONITORING AND EVALUATION WORKSHOP**

### **Logframe Methodology**

#### ***Purpose***

The purpose of the workshop was to provide participants from the various PVO's with:

- an appreciation for the logframe as a systematic methodology for designing, planning, implementation monitoring, and evaluating projects -- not simply an AID bureaucratic form requirement;
- a common understanding of key logframe concepts and terminology to reduce the confusion extant in AID and various PVO's;
- hands-on practice in applying the logframe methodology directly to their work under their AID Grant Agreement, and
- a basis to facilitate the Atlantic Resources Corporation team's subsequent consultancy interactions and follow-up with the respective PVO organizations and key personnel.

#### ***Summary of Presentation/Activities/Discussion***

Before the workshop began, a self-assessment questionnaire was provided to each participant to ascertain their level of familiarity with and competence in using the logframe and related project management tools. A copy of the logframe booklet prepared by Atlantic Resources Corporation was also given to each participant to use as a reference manual during and after the workshop.<sup>3</sup>

An initial background and overview of the logframe was provided in lecture form using overhead transparencies from the Team Technologies Training Manual.<sup>4</sup> The participants were then grouped by their respective PVO to function as team members for the remainder of the logframe workshop and to apply principles discussed during the workshop to their specific projects.<sup>5</sup> Each of the major components of the logframe was presented, interspersed with group work sessions. Group efforts were assisted by the Atlantic Resources Corporation team members "floating" between groups to observe and provide further clarification, guidance, and discussion as requested.

At the end of the first day, a handwritten draft logframe -- with Narrative Summary and Assumptions columns -- was completed by each PVO. Overnight, Atlantic Resources Corporation computerized, printed and reproduced copies of these draft logframes for the participants to use during the second day. The participants were asked to read the reference logframe booklet for homework.

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<sup>3</sup>Kenneth F. Smith, *THE LOGICAL FRAMEWORK: A SYSTEMATIC METHODOLOGY FOR PROJECT DESIGN, MONITORING & EVALUATION*. Atlantic Resources Corporation, Reston, Virginia, February 1993.

<sup>4</sup>The Logical Framework - A Trainer's Guide. Team Technologies Inc., Chantilly, Virginia.

<sup>5</sup>To this end, the participants were asked to bring key documentation to use for reference during the workshop.

The second day focus was on identification and selection of indicators, means of verification, and assumptions to complete the logframe. At the end of the logframe section of the workshop, the draft logframes were exchanged among the PVO groups for structured critique and feedback.

Few questions were raised by the participants during the formal presentations by Atlantic Resources Corporation, or the plenary sessions. However, discussion flowed freely during the work group applications. The Atlantic Resources Corporation team members were frequently called upon for help and comment, and nearly all participants demonstrated eagerness and active, serious involvement.

The logframe section of the workshop concluded with a post self-assessment questionnaire.

### ***Evaluation of Success/Impact***

The pre-workshop self-assessments indicated that many of the participants had been exposed to some degree to logframes. Nevertheless, for the most part, awareness was limited to superficial use of terminology, with a conceptually shallow understanding. Further informal discussions with participants revealed that previous logframe applications had generated a considerable amount of confusion, misunderstanding, and uncertainty.

At the conclusion of the day-and-a-half logframe workshop, a significant number of participants indicated that a high degree of learning had taken place.<sup>6</sup> Subjectively, all members of the Atlantic Resources Corporation team agreed that the participants' level of understanding was considerably enhanced by the workshop, and was particularly reinforced by the necessity to apply the logframe concepts immediately to their current work. However, the day-and-a-half workshop only afforded the opportunity for a cursory overview.<sup>7</sup> Some narrative summaries prepared by participants were inadequately articulated; many indicators were not clearly formulated; and several key aspects, such as target setting, were not covered sufficiently to bring participants to a level of complete understanding. Although the need for baseline data and the importance of life-of-project targeting were discussed, there was insufficient time during the workshop to cover these concepts in depth.

However, despite its brevity, the logframe workshop attained Atlantic Resources Corporation's three "technology transfer" objectives of enhancing PVO understanding, as well as providing an invaluable entre for Atlantic Resources Corporation team members to get acquainted and enhance interaction with the PVOs during the rest of the consultancy period. Immediately following the workshop, Atlantic Resources Corporation team members began working with the PVOs to reinforce the concepts and apply the substance from the workshop to ongoing activities.

Even with a conceptual understanding of logframes, manual typewritten logframe preparation is an administrative chore. Computer software--PC Logframe--facilitates this task. It would be appropriate for a few PVOs to acquire this software. However, the logframe is not the first step in

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<sup>6</sup>See the summary "before" and "after" assessment in Appendix A.

<sup>7</sup>Usually, at least a week of intensive training, followed by a further week or two of on-the-job assistance, are required for small groups of individuals to apply the logframe methodology.

project planning, nor the only one. In several instances it was apparent that various PVOs lacking an awareness or understanding of other techniques to improve their implementation planning, scheduling, and budgeting, as well as more formal management information systems for monitoring and feedback reporting.

### **Semi-Annual Report Revisions**

The last afternoon of the two-day workshop was devoted to the Semi-Annual Report (SAR). The purpose of the session on the SAR was to explain the changes in reporting required for the next submission (due May 1) and to obtain feedback on the revised guidelines with respect to clarity and feasibility.

The session began with a presentation on the new SAR guidelines and explanation, section by section, of the type of information and narrative required. After the presentation, the PVOs were given about 45 minutes to discuss the new guidelines and to prepare comments for discussion. PVO discussion was to be followed by a general open session on the new guidelines and SAR problems in general. That discussion had only begun when word reached the workshop participants that the police were closing the roads due to a snowstorm. The workshop was terminated very shortly thereafter, and discussion of the SAR was carried out during individual visits with each PVO. This happenstance had two effects: 1) the opportunity for a general open discussion among PVOs on the SAR was lost but 2) the more detailed discussions with each PVO, probably produced a more in-depth look at the SAR process and problems faced in the report preparation.

As a result of these discussions, the SAR guidelines have been revised again (see Appendix C). A discussion of outstanding SAR issues occurs later in this report.

## **C. TARGETED PVO CONSULTANCIES**

### **Introduction**

Four PVOs were targeted for more extensive help in project monitoring: CDP, ANERA, CRS, and AMIDEAST. As indicated above, work with AMIDEAST was delayed and discussion focused only on definition of issues to be addressed during the consultancy that will occur after their external evaluation. For the other three targeted PVOs, consultant work began immediately following the workshop. The results of those efforts over the remaining two and a half weeks in Jerusalem are summarized below. Included for these three PVOs are a summary of weaknesses addressed; activities of the consultancy; logframe issues; an evaluation of data use for PVO planning, monitoring, and reporting; evaluation of success of the consultancy, and further work needed to improve project monitoring.

### **COOPERATIVE DEVELOPMENT PROJECT (CDP)**

#### **Summary of Weaknesses Addressed**

One of the major problems for CDP has been the difficulty in adapting the logframe methodology to their work with cooperatives. Specifically, since most of CDP's work lies in training and institutional development, strictly quantitative or concise qualitative indicators have been hard to develop. Consequently, work during the consultancy mainly focused on helping CDP staff develop indicators that would provide accurate indication of progress to AID.

#### **Activities of the Consultancy**

Atlantic Resources Corporation consultants worked with CDP staff over four sessions. Work the first three days focused primarily on what has been the most intractable issue for CDP: finalizing a project logframe that included meaningful and useful indicators. Once a sound logframe was agreed upon, CDP staff was asked to begin work on completing a worksheet that required a baseline and targets for each indicator. In the final working session, consultants met with staff to help them understand the importance of establishing targets for indicators. In addition, the proposed revisions to the SAR were discussed. In the course of Atlantic Resources Corporation's work with CDP, a number of monitoring issues arose which are discussed below.

#### **Logframe Issues**

##### ***Narrative Summary***

CDP has made a great deal of progress on their logframe since the October-November visit, though a number of minor problems still need to be resolved. CDP intends to implement one of the recommendations of the Devres evaluation--that they target other institutions, such as NGOs, for development. However, their Grant Agreement with AID stipulates that CDP will work only with cooperatives. To avoid confusion in reporting at this point, the CDP logframe (see Appendix B) will

be limited to their work with cooperatives. If AID wishes CDP to work with other institutions, CDP will need to demonstrate how the current logframe can be applied to those institutions. If the cooperative logframe is not applicable, CDP will need to develop new objectives and indicators as appropriate.

CDP is currently working with nine cooperatives, assuming responsibility for developing these cooperatives to self-sufficiency and reporting to AID on their progress. While it is understood that CDP allows non-targeted cooperatives to participate in its training courses (to prepare them for more extensive assistance in the future), AID may wish to reach agreement with CDP on the number of cooperatives CDP will work with and report on at any one time. The current Grant Agreement states that CDP will work with 15 cooperatives over the life of the project.

Outputs in the logframe remain essentially unchanged since the previous visit (i.e., institutional, managerial, technical development), though the wording has changed to reflect completed actions.

### ***Indicators***

Purpose level indicators were designed to measure progress in two areas: 1) financial sustainability and 2) overall institutional, technical, managerial development. The indicators at the purpose level are:

- **Percent of operating costs covered by revenue.** This indicator will measure the cooperatives' progress toward profitability and will be reported annually in May because cooperatives are audited in December. CDP regards this indicator as a better measure of financial strengthening than profitability or dividend indicators, which cannot show movement toward the objective, only that the objective has been achieved.
- **Percent of cooperatives advancing on schedule toward the fifth stage of development.** Consultants and CDP staff spent a great deal of time grappling with a specific indicator for measuring cooperatives' overall institutional viability. It was decided that the most inclusive measure would be based on the five-stage scale for model cooperative development that CDP has devised (see Implementation Plan for Cooperative Development, Appendix B).

Output level indicators listed in the logframe are self-explanatory. While working with CDP, consultants were informed that AID/W wished to include the average value of loans as an indicator. CDP can report this figure if AID so wishes, but internally it will use the percent of the total fund loaned to cooperatives as an indicator of the extent the fund is fulfilling its purpose.

### ***Means of Verification (Data Collection)***

CDP has been working for several months on its monitoring system and has identified the means of verification for all indicators. They intend to conduct new needs assessments with in-house staff for eight of the cooperatives (Tulkarem is at stage five). These needs assessments will provide data to identify training needs and will at the same time establish a baseline for indicators for which CDP is now lacking data, such as the percent of members using services.

CDP intends to create a database not only as a means of storing and reporting on indicator data to AID but for other kinds of internal project monitoring.

### **Evaluation of Data Use for PVO Planning, Monitoring, and Reporting**

The indicators that CDP has included in its logframe are a combination of indicators it will actually use in its own monitoring (e.g., loans, courses, hours of assistance) and those that it will use primarily for reporting (e.g., cooperatives prepare annual workplans). For more ambiguous indicators, CDP will continue to rely on direct observation and interaction with cooperatives to monitor overall progress because monitoring human resource and institutional development is largely qualitative. Thus, the usefulness to CDP of the data it reports to AID will vary with the indicator, though it will provide AID with a sound basis for assessing CDP progress.

### **Evaluation of Success/Impact**

CDP has been working to develop a monitoring system since the Devres evaluation first identified its monitoring weaknesses in late summer 1992. Since then, work has focused on articulating CDP objectives and outputs, determining effective ways of measuring progress toward them, and developing a data collection system for key indicators. The process has been necessarily long and arduous, but it has brought CDP staff to a realization of the need for such a system to measure their own performance and not merely to satisfy AID reporting requirements. In working with CDP staff, consultants were impressed by their seriousness in developing a useful monitoring system. CDP staff has improved its understanding of logframe terminology and methodology, and recognized the need for regular monitoring and data collection for managing its project.

### **Further Work Needed to Improve Project Monitoring**

The next step for CDP will be to establish an automated system to enter, store, and retrieve indicator and other monitoring data. CDP has said that it lacks the in-house expertise to design and set up such a system and will require assistance. They have asked for assistance in this area under the WB/Gaza Monitoring Project.

## **AMERICAN-NEAR EAST REFUGEE AID (ANERA)**

### **Summary of Weaknesses Addressed**

The following weaknesses were identified in ANERA's program management process:

#### ***Planning***

- Lack of systematic internal monitoring, reporting, and feedback of the status and disposition of new locally-generated proposals.

- Lack of detailed work planning and scheduling of accepted activities prior to implementation. A summary descriptive activity implementation plan is included in each file; however, the information is quite superficial and insufficient for work planning, scheduling, and monitoring against the plan.

### ***Monitoring***

- Lack of systematic identification of data required for monitoring inputs, activities, outputs or purpose.
- Lack of systematic collection of data required for monitoring inputs, activities, outputs or purpose.
- Lack of systematic, timely data storage.
- Lack of systematic routine data analysis for internal monitoring.

### ***Reporting***

ANERA has developed a computerized (PARADOX 3.5) project-oriented database system which is functioning and can be used for sorting and producing columnar report listings by various fields. The system is operational, and includes logical framework statements. This is a significant achievement and should not be undervalued. However, while this sorting capability is invaluable, and the system has great potential as a management information system, and is constantly used by the Administrative and Financial Officer, the principal weaknesses are that:

- The existing computerized database is primarily descriptive and currently underutilized by other ANERA management and technical consultants. Currently, a "Status" code indicates whether a particular project is "Active," "Completed," or "Postponed." Key project-related financial data is obtained monthly from ANERA's accountant and reported manually on a structured format for monthly manual expenditure updating.<sup>8</sup> Apart from the financial aspect and limited "status" summary, the system is primarily descriptive rather than progress-oriented.
- The PARADOX database system has the capacity to produce graphics as a by-product of the data stored, which could considerably enhance both comparative performance and time-series trend analysis at both the activity and higher summary levels. ANERA may wish at some point to tap this latent capability.

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<sup>8</sup>A computerized financial accounting system is partially installed. This system was custom-designed and programmed by a local external consultant, but is currently being modified. It is a local database type program called BTRIEVE, that can convert and present data in US dollars or shekels.

## **Activities of the Consultancy**

Work with ANERA began with extensive discussions with the ANERA representative regarding ANERA's current strategy, planning and operational concerns, reporting needs, and future directions and intentions. From this discussion, a new comprehensive objective tree (see Appendix B) was drafted and presented to ANERA's staff for review, discussion, and modification.

The proposed revised guidelines for the SAR format were also reviewed and discussed in depth in terms of substance, concept, need (by AID as well as internally by ANERA), and the prospects for integrating these requirements. To this end, a Lotus database file (as well as a Lotus macro) of key ANERA data items was prepared. The Lotus system intended to serve two purposes:

- the consultant's own edification about the nature, extent, and structure of ANERA projects,
- to demonstrate the potential for using database information for analytical and managerial purposes.

Each of ANERA's technical consultants and staff was interviewed, either individually or in small groups, to obtain perspectives on project documentation and progress reporting. In addition, several internal staff meetings were attended, including an initial review and consideration of newly proposed projects submitted to ANERA by NGOs.

ANERA's official project files representative of different project sectoral activities were reviewed to examine the level and quality of documentation contained therein, as well as to explore the extant reporting process.

Extensive briefings on and demonstration of ANERA's PARADOX database system were attended as well as discussion and illustration of the capabilities of another database software program, FOXPRO, that is also being considered for use by ANERA.

Subsequently, several field trips were set up to see some representative projects, meet with the institutional implementers, and observe technical consultant interactions with them, as well as ongoing activities at the sites.

At ANERA's request, initial reactions and suggestions for improvement with respect to project planning, management, and reporting were provided. To this end, an intensive one-day, in-house, hands-on action-training workshop was presented to familiarize ANERA staff with the PERT/CPM networking concept for planning and scheduling activities, and process reporting by milestones as one option for reporting progress at the output level. During this workshop, the participants applied the technique to several extant projects.

A final discussion and review of the logframes led to reformulation of a summary level ANERA logframe with the understanding that individual site-specific activity level logframes would be prepared or modified in the near future, as necessary and expedient.

The utility of several software packages (PCLogframe, Microsoft Project, Flowchart, and CCPlus) for project design, scheduling, monitoring, and chart preparation and presentation, as well as a personally designed Lotus Macro, FUPEVAL, for follow-up assessment of the impact of training programs were demonstrated.

Finally, assistance was given in determining the criteria to select a new staff employee for MIS coordination and management.

### **Logframe Issues**

ANERA is currently operating a comprehensive rolling-plan program rather than a discrete, pre-defined, blueprint project. Consequently, ANERA's summary logframe is more a conceptual framework of an institutional strengthening process than a description of substantive sectoral, site, or individual institution-specific upgrading, or functioning physical or operational entities.

For the most part, baseline and target data for these newly established indicators are not immediately available. Some can be obtained or developed within a few days. Others at the output level, and some baseline data, may take several months (including a special external survey team effort). This length of time is necessary because the data in the summary logframe are an aggregate of information at the site-specific activity level. Thus all sites will have to be revisited, and the indicators and data requirements discussed with (and obtained from) each institution.

The ANERA AID-IV project is in its last year of operation. While the logframe and management information structure is considered useful for future management both internally by ANERA and externally by AID, there is some question whether AID has weighed its need for target information for completed and active activities in light of the additional effort it will require to obtain that information.

The revised logframe, and rationale for the indicators chosen, are contained in Appendix B.

### **Evaluation of Data Use for PVO Planning, Monitoring, and Reporting**

ANERA perceives that once a systematic process has been established to collect and analyze data for reporting to AID every six months, much of the same information will also be useful internally for ANERA on a monthly basis.

### **Evaluation of Success/Impact**

Overall, the consultant rated the work as reasonably successful in that all but two of the items in the Scope of Work were satisfactorily accomplished. ANERA personnel appeared genuinely interested in improving their existing system for internal use as well as for reporting to AID; interaction with ANERA personnel was both congenial and fruitful; some basic technology transfer occurred in terms of objective tree preparation, logframe development, and PERT/CPM network construction for milestone progress reporting. In addition, assessments and conceptual discussions of management information systems design and reporting needs were attentively received by several key ANERA personnel.

Although many concepts were discussed and ANERA appeared keen to adopt most of them, the time available was not sufficient to get much beyond the superficial conceptual stage. The actual design and redesign of the requisite system, and operationalizing it, will require much more time and an intensive level of effort. The two tasks which were not satisfactorily accomplished were:

- ensuring that data for each indicator is accurate, collected systematically, and stored properly, and
- assisting staff in establishing accurate baselines and realistic targets for each indicator.

The former task cannot be undertaken until a system of data collection from the field is formulated and implemented; and also until the PARADOX database system is modified and ANERA's internal data processing protocol is upgraded and implemented. Similarly, for the latter task, only the need for baseline and target data could be (and was) addressed during this time period. Actually conducting field research to establish baseline data and realistic targets will require a much more extensive level of effort. However, some progress on establishing actual targets was made.

### **Further Work Needed to Improve Project Monitoring**

The following recommendations address the weaknesses identified in ANERA's planning and monitoring process:

- A simple tracking system should be developed for new proposals, and a status chart should be developed, maintained, and periodically circulated to ANERA technical staff for their information.
- A PERT/CPM flowchart should be developed for all activities, and a milestone<sup>9</sup> tracking system incorporated into ANERA's internal monitoring and external reporting system, and status charts should be maintained on each activity by ANERA technical staff and periodically discussed.
- Purpose, output, and activity level indicators and targets should be reviewed and culled from individual activity logframes. In many instances the precision of the indicators needs to be upgraded and specific targets added.
- Criteria need to be established for a data collection system for summary level reporting.
- Specific data formats must be prepared for recording and collecting all required data.
- A simple, regular, frequent (i.e. monthly) structured combination entry (number and/or date) and multiple-choice Likert-type qualitative checklist status/progress reporting system should be developed by ANERA management. Establishing criteria and assessing status should be done by ANERA technical consultants in cooperation with the implementing institutions and representatives of the target beneficiaries. The focus

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<sup>9</sup>A "milestone" is a significant identifiable step or accomplishment in the project implementation process -- e.g., grant signed, implementation plan prepared, contract awarded, equipment installed, technical training completed, system operating.

should be on output and activity indicators, as well as leading indicators at the purpose level. Interim quantitative targets should also be established for outputs, wherever possible. Where this is not feasible, process milestones should be utilized. In addition, a subjective judgmental rating scale with appropriate criteria for each level rated should also be established.

- Periodic analysis and evaluation (as distinct from routine monitoring) was not explored in any depth during this consultancy. Nevertheless, two aspects of evaluation were discussed with ANERA for their consideration:
  - Identification of comparable control groups outside ANERA's targeted areas, and
  - provision for systematic recording of key evaluative data items at the purpose and output levels throughout the life of the project, both within and outside the areas served, as a data source for subsequent external evaluation teams.

A separate intensive analysis should be undertaken (either by ANERA or by an external consultant) to ascertain what data would be appropriate to record for subsequent comprehensive ANERA project evaluation; the level of effort it would entail; as well as to identify the appropriate timing and feasible methodological options for conducting the study.

- After the individual activity level reporting system recommended above has been designed, developed, and instituted, a concerted effort should be made by ANERA to utilize the extant PARADOX database system and upgrade it to serve a wide variety of ANERA management analysis and reporting needs at various conceptual levels. For instance, the database could be improved with respect to recording indicators for monitoring progress, summarization, comparative and trend analysis by sectors, components, functional concerns (such as WID-involvement), and geographic areas; automated integration of financial data; correlation of work accomplished and cost analysis, as well as the incorporation of inventory control aspects for end-use auditing of commodities. Analyses and reports generated by the system could also be enhanced with graphics.

With regard to ANERA's future needs to improve the monitoring of AID-assisted projects, ANERA's representative inquired as to the availability of the consultant for a follow-up consultancy in the immediate future to continue work begun during the past three weeks.

#### **Atlantic Resources Corporation Response to the Consultant Report**

The consultant has accurately described the difficulty of tracking ANERA's AID-funded project and the problems encountered in attempting to develop an effective monitoring system. However, Atlantic Resources Corporation takes exception to the consultant's proposed solutions to improve monitoring.

First, in an attempt to simplify monitoring, the consultant and ANERA have redefined ANERA's project purpose as a single one of "institutional strengthening." Atlantic Resources Corporation does not believe that all ANERA's activities are directed at in-depth institutional strengthening. In fact, many objectives are actually obscured by this vague definition. Secondly, indicators developed to measure progress toward institutional strengthening (e.g. milestones) are necessarily vague. While milestones may be valuable for internal project management, they do not provide adequate monitoring data for purpose level monitoring from AID's perspective.

A more appropriate solution to the problem, and one that has been endorsed by AID, is for ANERA to shift its "rolling program" approach to a more narrowly focused project with a predefined set of activities that address specific objectives. Since ANERA's project is ongoing, a complete restructuring at this point is impractical. Therefore, it is recommended that ANERA use this method in its next project proposal. In the meantime, and with the help of a further consultancy in April, Atlantic Resources Corporation recommends the following procedure to produce meaningful monitoring data:

- the consultant, Atlantic Resources Corporation, and AID develop a set of indicators for the current project that AID feels is appropriate for its oversight needs;
- the consultant convey to ANERA in Jerusalem this set of indicators;
- ANERA and the consultant specify additional indicators that may be important to ANERA for its own internal monitoring, and
- the consultant work with ANERA to develop data to report on these indicators to the extent possible.

Atlantic Resources Corporation agrees with the consultant that large data collections schemes should not be developed and instituted for a project that is nearing completion. But Atlantic Resources Corporation does believe that data collection procedures can be either improved or, where lacking, developed that will not only help ANERA improve monitoring of the current AID-funded project but be applied in future projects as well.

#### **CATHOLIC RELIEF SERVICES (CRS)-INTEGRATED RURAL DEVELOPMENT/CAPACITY BUILDING**

**Summary of Weaknesses Addressed** (Note: This consultancy covered only CRS's IRD project. (For discussion of the Village Health Training Services Project see p. 26)

The following needs were addressed during the consultancy:

- Preparation of a project design for integrated rural community development.

CRS is in the process of redesigning a proposed Integrated Rural Development/Capacity Building (IRD/CB) Project. A preliminary proposal was originally prepared more than a year and a half ago by a different CRS team. Recently a revised concept paper was prepared by current IRD staff and reviewed by CRS cluster staff in Cairo, resulting in some major revisions in strategies.

- **Building a CRS team approach to sustainable, participatory development going beyond sectoral concerns.**

The CRS staff has previously worked in very compartmentalized activities with no integration of activities toward a united purpose.

- **Specifying baseline data needs for communities and institutional capacity of local development institutions, planning data collection strategies, and utilizing information for project monitoring.**

Baseline data collection using the Participatory Rapid Appraisal (PRA) methodology had been used in an exploratory manner in four communities, but the dimensions of communities to be measured were not adequately specified and a good plan for systematic collection of comparable data which could be used for community selection and future impact assessment had not been developed.

### **Activities of the Consultancy**

This consultancy was very timely. Since the CRS staff was in the process of project specification and planning, it allowed the consultant to work with members of the Integrated Rural Development (IRD) team applying the logical framework methodology to an actual project design, including the preliminary specification of an appropriate monitoring and evaluation system to track the outputs and impacts of the project activities.

The consultant worked intensively with the CRS IRD team of nine staff members in working group sessions and on a one-to-one basis to explain logical framework methodology and to apply it to the process of designing the IRD/CB Project. Work included specifying objectives, assumptions, and selecting indicators of achievement which could be monitored throughout the life of the project.

Discussions with other CRS staff members ensured the integration of activities of environmental health and that gender equity was considered during the project design.

The PRA dimensions and guide questions used during training in Qussra and in briefer form in three additional villages were examined, and ways to improve PRA usefulness for selecting communities and providing baseline data for impact assessment were discussed.

A field trip to Arraneh in Jenin was made to observe a five-member Village Development Committee (VDC) working on technical specifications and procedures for securing a generator, the final element of an electrification development activity.

## **Logframe Issues**

A copy of the logframe constructed with CRS for their IRD/CB Project as it is defined at this point in time can be found in Appendix B.

### ***Narrative Summary***

Emphasis was on in-service training with all the team members participating in using the logframe as a systematic way to approach project design. The hierarchy of objectives was clearly specified and seen to fit comfortably within the AID Strategic Program Objectives for 1993-97.

### ***Indicators***

The strategy of the proposed project is to work with and develop the capacity of counterpart local NGO organizations to actually implement the project activities at the community level. These suggested indicators of achievement of objectives must be reviewed, revised, and agreed upon with the local counterpart organizations as the project design is finalized.

Different types of objectively verifiable indicators were examined. It was stressed that while it was important to measure quantity, it is also often desirable to tap quality of achievement (level of performance), measure the extent of beneficiary participation and impact, and track the level of completion against the scheduling of targeted outputs. The latter will be very important when working with implementation of activities through counterpart NGOs and VDCs.

Since the project depends on working with VDCs to implement development activities which are priorities for these communities, it will be necessary to take into account information from the PRA needs assessments and expressed development priorities before setting firm output targets.

### ***Means of Verification (Data Collection)***

It was repeatedly stressed that it is desirable to keep indicator measurement simple, practical, low-cost and, to the extent possible, designed to allow community members themselves to carry out the measurement and interpretation of the findings as participants in monitoring.

The use of outside testing, such as assessing water quality, must be carefully designed and incorporated into the budget. The collection of water samples and monitoring water quality would most likely be one of the environmental health educator's tasks. The easiest and least costly method is needed for testing. Alternately, the health educator might switch efforts from water testing to emphasize water purification through additives to ensure potable water if the water quality cannot be adequately determined. The indicator of potable water would then switch to units being treated through chemical purification.

The Village Health Service Project Manager suggested that official reports from clinics and laboratories of the incidence of waterborne disease such as amoebic dysentery determined by testing fecal samples is the most direct indicator of improved community health. Potential difficulties of this measurement strategy were discussed. In addition, the incidence of reported diseases often increases with the increased use of health services rather than decreases as posited by the development hypothesis.

The consultant suggested that perhaps an equally useful but simpler to collect albeit less precise measure might be self-reports from a representative panel of community residents of the incidence of the symptom of diarrhea during a recent period of easy recall, such as the past week or month, woven into a discussion of general health problems.

Ways of measuring institutional capacity were explored. In addition to self-assessments of institutional capacity of VDCs and local counterpart organizations against a set of guidelines, it was suggested that user groups working directly with these organizations be queried concerning their experiences and perceptions.

A useful participatory monitoring method is to establish a representative panel sample of community residents during the initial PRA which would periodically be queried on a wide variety of subjects and issues, ranging from health within the family (e.g., incidence of diarrhea) to their knowledge of the local development activities and VDC communications, perception of the level of efficacy of the local organization, and the functioning and maintenance of infrastructure systems.

#### **Evaluation of Data Use for PVO Planning, Monitoring, and Reporting**

##### ***Baseline Data Needs for IRD/CB Community Selection, Project Monitoring, and Evaluation***

The IRD team and the consultant identified the major pieces of information needed for selection of the targeted communities. It is currently proposed to select 20 communities from the northeast area of the West Bank. Refugee camps and municipalities and areas with village councils that receive regular funding from CIVAD will be excluded from consideration. From the remaining populated locations, local communities that have a potable water deficit will be targeted.

Data on the community needs and development priorities are required at the outset of the community selection process to allow a match of community development priorities with CRS capacities in the areas of community health, water and sanitation, small business development, land reclamation, agricultural roads, and development of water resources for agriculture under the IRD/CB project.

Data on the water systems of the villages in the region and the hydrological resources for potential development are being prepared by the counterpart NGO for hydrology. In addition, the CRS VHS Project has recently collected data on water quality from some communities. This information may also be utilized in identifying target villages.

In the sub-population of villages which have initially been identified as being deficient in potable water, a community needs assessment will be conducted and baseline data will be collected utilizing the PRA methodology that emphasizes the involvement of the community in assessing their own needs and prioritizing development activities through knowledgeable key informants. Unified criteria for selection of communities will be developed with counterpart NGOs.

Currently the IRD team in conjunction with the VHS and social services (WID) staff has identified key areas where baseline data are needed, some of which were not specifically included in the exploratory PRAs conducted in the four villages. Ideally, baseline data should also be collected from additional, comparable villages in the region that will not be targeted in the project, to facilitate impact analysis after the completion of the project.

It was noted that a good deal of detailed information was collected in the preliminary PRAs which is not directly useful as baseline data for community selection or as benchmarks against which to measure project impacts. Suggested revisions to the PRA data items/categories were discussed with emphasis on simplifying and targeting information directly relevant to the selection of communities and planning, monitoring, and evaluating the impact of development activities. The IRD/CB Project plans to undertake PRAs as a first community level planning activity with the extended RD IV funding over the next six months.

A revised IRD/CB project proposal is expected to be submitted to AID by the end of July 1993 for funding to begin in October. Ideally the data from the PRAs will have been collected, analyzed, and utilized to set realistic output targets on the basis of the priorities of the selected communities. If these data are not available, the proposal's logframe targets may have to be adjusted as soon as the planning inputs from the selected communities are available.

During the process of specifying the logframe objectives and objectively verifiable indicators, key information was identified that must be included in the baseline PRA or obtained through other means. The key indicators of achievement to be monitored during the life of the project were also tentatively specified. These indicators need to be further clarified and agreed upon in conjunction with the counterpart NGOs planned to be operationally involved in implementing the project activities.

In addition to the PRA baseline community data and needs assessment, a system of collecting periodic data in a participatory manner for monitoring development project implementation and management and assessing VDC functioning was explored. Town meetings and large group gatherings are not possible options under current political restrictions. One participatory monitoring mechanism could be to establish a representative panel sample of households during the PRA process and then periodically query the members of these households concerning a wide variety of issues related to the progress of the project. By returning to the same panel, the informants will be able to judge change against their previous experiences. It is expected that repeated visits will improve cooperation and heighten perception to provide better assessment than randomly polling separate samples each six-month reporting period.

### ***Training Needs Assessment for VDC Institutional Capacity Building***

Once the target communities are identified, representatives to the VDCs will be selected if a VDC is not already constituted. Subsequently a participatory training needs assessment for improving planning and management skills of the members of the VDC will be undertaken. In addition to the

technical planning and management skills, training aimed at improving participation and communication in the entire community needs to be stressed. Ways to promote gender equity must be sought. Communication and negotiation skills to promote conflict avoidance and conflict management need to be developed.

### ***Local NGO Counterpart Capacity Building***

The IRD/CB Project aims to develop the capacity of selected NGO development counterparts to function effectively in a participatory manner at the community level through representative VDCs and user groups of participant beneficiaries. Twelve criteria for choosing counterpart institutions have been developed by CRS. Technical competence should be added to their criteria and given great weight. An Organizational Effective Checklist exists which may be adapted as a tool for assessment of institutional development.<sup>10</sup>

A preliminary questionnaire for organizational self-assessment has been drafted by IRD staff. This type of instrument is useful but needs to be focused and made applicable to the current situation where the emphasis is on transferring skills in participatory planning and management of local development activities to local village development institutions.

### ***Database Systems for Information Storage, Retrieval, Analysis, and Reporting***

Currently CRS has a well-trained computer staff and sufficient computer systems to carry out their tasks utilizing several software packages including VP-Planner Plus, an enhanced spreadsheet, database, graphic, and report generation package from Stephenson Software, Inc., Lotus 1-2-3, Word Perfect 5.1, and an Arabic word processing package. Database information is being tracked for the components of the RD III Project - SED, Agricultural and Paravet activities utilizing VPP software.

It will be desirable to develop a database that contains community baseline characteristics and priorities, development activity inputs, outputs, and purpose level objectives preferably running in Arabic, which would be periodically updated by and shared with the counterpart NGO implementing partner organizations and the VDCs.

A system of routine reporting against implementation scheduling and output monitoring as set out in the logframe needs to be devised. Training of the CRS and the counterpart NGO staff should be planned in the utilization of the software, maintenance of the database, and report generation including appropriate statistical analysis and graphic presentations.

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<sup>10</sup>Fernand Vincent and Piers Campbell. *Towards Greater Financial Autonomy. A Manual on Financing Strategies and Techniques for Development NGOs and Community Organizations.* IRED, Geneva, 1989. pp. 11-12.

## **Evaluation of Success/Impact**

The IRD team is now able to conceptualize and articulate more clearly their proposed IRD/CB Project. The primary purpose of developing the local institutional capacity of technical counterpart organizations and representative VDCs to plan and manage sustainable community level development activities in a participatory manner is well understood. Gender equity will be addressed to the extent possible in the VDCs.

The separate sub-purpose objectives in agriculture or small enterprise development or environmental health, while directly relating to improved community well-being, are now clearly understood as means through which to achieve a primary objective of local capacity building. Emphasis is to be placed on impacting the development process through implementing development activities.

Clarification of data needs for baseline data and project monitoring has been advanced. There is an understanding of the need for a clear plan for collection and utilization of data. It is acknowledged that data must be comparable across communities and from one time period to the next.

The next steps in project design and implementation are clear. Counterpart NGOs must be identified and selected. Proposed targets and project implementation strategies need to be worked out in conjunction with all the counterpart organizations simultaneously to form an integrated network of activities. Baseline data collection instruments (PRAs and additional baseline measurements) need to be developed and pretested, revised and implemented, and data processed and analyzed to allow for community selection and practical targeting of activities and outputs.

## **Further Work Needed to Improve Project Monitoring**

The development of an integrated project implementation strategy and schedule by CRS in conjunction with the six targeted counterpart organizations is the most crucial planning activity with which assistance is needed. While three of the IRD staff have had some training in PERT/CPM networking, none has a high enough level of expertise to integrate all project activities by a number of organizations simultaneously. All IRD staff are exceedingly anxious to have assistance in this technique. As the overall purpose is to increase the capacity of local organizations to plan and manage development activities, an action workshop providing hands-on training for the IRD and counterpart organization staff to plan joint activities on the basis of the articulated logframe would be ideal.

Assistance is also requested by the IRD team in systematizing and actually implementing the baseline data collection, analysis, and reporting activities while utilizing participatory methodologies rather than costly and complicated methods such as household surveys requiring large-scale processing and outside statistical analysis.

A system of periodic collection of information on indicators of achievements for monitoring needs to be established. A database of indicators for routine monitoring should be designed and programmed, ideally using an Arabic/English software package. A system of routinized indicator calculations based on aggregated activities across a number of communities and report formats needs to be established.

## **Atlantic Resources Corporation Response to the Consultant Report**

While the consultant helped CRS understand how to integrate activities in a rural development project, Atlantic Resources Corporation believes that this consultancy did not achieve the following objectives intended to improve CRS's monitoring capabilities:

- to help CRS construct a sound logframe to be used in preparing the project proposal;
- to review and finalize the Participatory Rapid Appraisal (PRA) for use in needs assessment baseline data gathering, and
- to develop a data collection plan for monitoring and reporting to AID.

The logframe submitted at the end of the consultancy is incomplete and will require further work. (Specific comments will be shared with CRS under separate cover.) To some extent, the project has been designed around its staff, which may explain the broad scope of the logframe. AID must decide if it wants a health component in the rural development project when it is already funding a separate project through CRS. At this point it is not clear to what extent, if any, IRD health activities dovetail with those of the Village Health Project.

The consultant repeatedly stressed the need for local organizations and NGOs to participate in data collection and analysis. Atlantic Resources Corporation disagrees with this approach for a number of reasons. First, systematic collection and effective use of the data require experience which CRS is in the process of acquiring; it would be premature to engage community members in measuring and interpreting data until CRS has demonstrated skill in using such a system. Once CRS possesses competence in this area, it can then transfer these skills to its local counterparts at an appropriate time and as dictated by project objectives. Second, as the responsible agent of the project, CRS needs to have data collectors, data and analysis in-house not only to assure data quality and reliability but to enhance management and planning as well as reporting to AID.

While weaknesses were alluded to in the PRA, no specific recommendations were made and the PRA may still require modification. The same applies to the training needs assessment.

While Atlantic Resources Corporation agrees with the recommendation that CRS should receive help in planning and scheduling, Atlantic Resources Corporation disagrees with the suggested inclusion of counterpart organizations in AID-funded training for a project that has not yet been approved by AID.

## **AMIDEAST**

### **Summary of Issues Covered in Visit**

Discussions with AMIDEAST focused on the type of assistance they would like in their consultancy. Since the consultancy was postponed to follow an external evaluation, the results of the evaluation may also identify specific issues that need to be addressed.

AMIDEAST faces two major problems in project monitoring. First, its AID-funded project currently provides training for individuals within organizations and as such it is activity oriented. It is therefore difficult to develop an integrated objective tree with purpose and outputs. Second, AMIDEAST has never monitored the impact of its training activities either in terms of the quality of training or the impact on the lives of the trainees and/or the organizations with which they work.

Discussions with AMIDEAST revealed that they plan to restructure their AID project with an institutional strengthening focus. The upcoming consultancy could help AMIDEAST in the project design phase by utilizing the logframe methodology as a planning tool. A carefully designed project would provide the basis for effective monitoring and reporting.

In addition, AMIDEAST will need assistance in developing methods of measuring the impact and quality of their training activities. They have requested such assistance as part of the consultancy and would like to enlist the services of an expert in the evaluation of training.

The country director will be at the AMIDEAST home office from April 26 through May 7. A good deal of progress toward development of a logframe for the new AMIDEAST project could occur at that time. In addition to the visit of the country director, the AMIDEAST programmer will be in the home office from March 29 to April 6. Work with her and other AMIDEAST home office staff during that time could focus on the evaluation of training with emphasis on methodology and data storage and retrieval. Work at the home office on both issues would save considerable time in Jerusalem.

The Jerusalem consultancy should take place as soon as possible after the country director's return to Israel and after the results of the external evaluation have been reviewed and addressed by both AMIDEAST and AID. This means the consultancy will probably have to occur around the second week of May. Atlantic Resources Corporation will begin work immediately to find a suitable individual for this consultancy.

## **D. NON-TARGETED PVO WORK**

### **Introduction**

Visits with non-targeted PVOs focused on logframe review and finalization, discussion of indicators to measure progress on project purpose and outputs, discussion of targets for those indicators against which progress would be measured in the SAR, and the data collection methods that would be used to gather information for reporting. It was assumed that with the considerable work done on the logframes for the YMCA, SCF, SCH, and the CRS Village Health Project before leaving for Jerusalem, and the individual work sessions that were part of the Logframe Workshop, most of the work on logframes would be completed and discussions in the individual PVO meetings could move onto targeting and data collection. Unfortunately, this was not a valid assumption in most cases, and much more time than planned was needed to finalize logframes. A complete description of the status of the logframe process is presented below for each of the four non-targeted PVOs. None of the non-targeted PVOs was able to produce targets for their purpose and output level indicators. To help them develop targets, all were given a target worksheet (see Appendix A) and were asked to complete it for all indicators and forward it to Atlantic Resources Corporation by March 15, 1993.

In addition to logframe issues, discussion with the non-targeted PVOs, as with the targeted PVOs, also covered SAR revisions and reporting issues; general issues relating to the interaction between AID (both Washington and Jerusalem) and the PVOs, including what AID could do to improve relationships; and the quarterly report (activity reporting) issue.

### **YMCA**

#### **Status of Logframe, Indicators, Data Collection**

The YMCA staff had spent considerable time between the workshop and the consultant visit finalizing their logframe, so minimal time was required for discussion of purpose, outputs, and indicators. The logframe finalized in a working session at their office in Ramallah can be found in Appendix B. The YMCA will now work on developing targets for all indicators and will send those targets to Atlantic Resources Corporation before March 15, 1993. Data collection procedures are complete for the YMCA; their tracer studies and internal records will provide accurate, complete information for monitoring and reporting.

#### **Current Assessment of Strengths and Weaknesses**

The YMCA staff has a good understanding of the logframe process and of the importance of monitoring as part of project management. AID reporting will not place additional burdens on them since they collect most of the information for internal monitoring. However, the issue of activity reporting for the AID West Bank and Gaza monitors posed something of a problem for them. They indicated that they cannot make any commitments on reporting without the approval of the YMCA home office.

## **Further Work Needed to Improve Project Monitoring**

It is not anticipated that any further work in project monitoring will be required for the YMCA.

## **SAVE THE CHILDREN FEDERATION (SCF)**

### **Status of Logframe, Indicators, Data Collection**

The logframe for SCF is not complete. Prior to departing for Jerusalem, the SCF logframe was split into three parts to reflect the work being done in their three component parts. After considerable discussion with the SCF Director, it was decided to combine the separate logframes into one because all three had the same purpose: increased self-reliance within targeted communities in the West Bank and Gaza. The current logframe, contained in Appendix B, has five outputs that all lead directly to the purpose. Indicators chosen at the output level will accurately reflect progress toward the project outputs and thus toward the purpose. At this point in time, however, SCF has not developed a purpose level indicator to measure the impact of their project, and the means of verification and assumptions are also not complete. Outputs and indicators reflecting work in the health area were not incorporated in the logframe since only \$10,000 is allocated to health. However, work in the health area should be monitored at the activity level.

Considerable discussion focused on the development of a purpose level indicator. It was suggested to SCF that they develop an index that could be used to measure self-reliance in their target areas and that they measure progress against this index. Since SCF has had similar purposes in other projects, it may be the case that indicators have been developed to capture impact at this level. It is suggested that SCF/Jerusalem continue to try to develop an index for purpose level impact measurement either among their staff in Jerusalem and Gaza, or with SCF home office staff.

It should be no problem for SCF to complete the means of verification and the assumptions sections of the logframe. They have a comprehensive data collection system that will provide all of the data, and their thorough understanding of the conditions necessary to work in the West Bank and Gaza should allow them to accurately specify the assumptions necessary to carry out their work.

### **Current Assessment of Strengths and Weaknesses**

SCF has a sound understanding of project monitoring and a comprehensive procedure for data collection for monitoring purposes; and, according to their recent evaluation, their program is excellent in most aspects. The major problem faced by SCF with regard to AID monitoring is that only 23 percent of their funding is derived from AID, and those funds are not isolated by component or activity. This fact makes impact evaluation of AID funding nearly impossible. It also dulls their interest in spending a great deal of time in developing logframes and indicators and special measurement efforts for those indicators just for reporting to AID. The Chemonics evaluation team recommended that the AID funding be isolated and spent on certain activities to reduce the burden of reporting for SCF. SCF has rejected this recommendation. In light of this, the problem and tension with regard to AID monitoring will most likely continue. Until the time that SCF does in fact target and/or isolate AID funding by component or activity, it is recommended that SCF not be pushed too hard in developing reporting procedures that are out of sync with their own internal monitoring procedures. With the submission of the next proposal, however, AID has an opportunity to incorporate the logframe

methodology (including indicators and targets) into the project from the beginning. If this is so, the understanding and acceptance of the logframe as part of the normal project development, monitoring, and reporting will most likely increase.

#### **Further Work Needed to Improve Project Monitoring**

SCF was asked if the WB/G Project could provide any further assistance to them in the areas of logframe development and/or project monitoring. SCF indicated that they did not need help at this point but may be interested in such after their new project is funded.

### **SOCIETY FOR THE CARE OF THE HANDICAPPED (SCH)**

#### **Status of Logframe, Indicators, Data Collection**

The November assessment of SCH's monitoring system concluded that SCH monitored and documented its activities carefully. However, most of what SCH was reporting to AID was not useful, while important information on progress toward objectives, though well documented, was not reported. Consequently, discussion with the SCH Director was directed at obtaining agreement on purpose and output objectives and indicators for reporting progress toward those objectives (see SCH Logframe, Appendix B).

SCH's developmental education for children in the Gaza Strip aims ultimately to prepare handicapped children for entrance into higher level programs where they can receive training and skill development to function as productive members of Gazan society. Most at-risk children go on to normal school. As a result, purpose level indicators measure the percent of those who have graduated, i.e., those who have been successfully *prepared* for further education. However, while admission of SCH graduates to higher level programs is not within SCH ability to control (because of limited availability of places for the children and also because these higher programs are not funded by AID), it is also important to measure the number of children who are *actually accepted* into higher level programs. Such acceptance provides the rationale for the program as it has been designed. Purpose level indicators will be reported in the November SAR as autumn is the time teachers learn whether previous students have gone on to further education.

#### **Current Assessment of Strengths and Weaknesses**

SCH currently gathers data on all indicators in the new logframe. However, most of the data are stored in Project Managers' hard-copy files on children and teachers and, until now, have not been extracted for reporting to AID. Once agreement on the logframe has been obtained, SCH intends to create a computer program for storing this data to expedite SAR reporting. Because the SCH Chairman was out of the country, final approval of the logframe is still pending. Once the logframe is approved, SCH will begin work on establishing baselines and targets for the indicators and will forward them to Atlantic Resources Corporation by March 15, 1993.

## **Further Work Needed to Improve Project Monitoring**

SCH still does not have sound grasp of logframe methodology. In view of this, Atlantic Resources Corporation has offered assistance to SCH in helping them construct a logframe for the project for the hearing impaired. Also, in light of past weaknesses in semi-annual reporting, SCH will need assistance in preparing their SAR under the new guidelines. SCH has requested that Atlantic Resources Corporation review the May 1 SAR and make suggestions for improvement before it is submitted to AID.

## **CATHOLIC RELIEF SERVICES (CRS)/ VILLAGE HEALTH TRAINING SERVICES PROJECT**

### **Status of Logframe, Indicators, Data Collection**

This project suffered from the outset from inadequate planning for both implementation and monitoring. To expedite progress, a draft logframe was prepared by Atlantic Resources Corporation and presented to the Project Manager for comment. The logframe incorporated AID comments both on the CRS baseline health survey and on initial indicator selection and drew primarily from the exhaustive list of indicators prepared by the Project Manager and CRS health consultant. Atlantic Resources Corporation consultants worked with the Project Manager to finalize the proposed logframe and obtain agreement on indicators for monitoring progress.

It should be noted that the CRS health project intends to conduct a number of activities not directly related to primary health care, such as care for the elderly and the handicapped. These non-primary health care elements form roughly 20 percent of the project. However, in the interest of simplifying reporting, the logframe is intended solely for the purpose of measuring health status primarily of infants and their mothers and secondarily of the target families. Any additional impact or successes regarding other health activities will be described in the SAR narrative.

### ***Indicators***

CRS will report on four purpose level indicators:

- **Incidence of diarrhea.** This indicator will measure the reduction of parasitic diseases brought about by improved hygiene, improved preparation, and storage of food, safer drinking water, and improved sanitation/sewage disposal.
- **Incidence of respiratory diseases.** There is a less direct linkage between the types of interventions planned and respiratory ailments. Moreover, the questions covering this indicator in the baseline survey combined incidence of colds with more serious (and preventable) illnesses. For these reasons, the indicator should be interpreted with caution.

- **Incidence of low weight for age.** This indicator is intended to measure nutritional changes among infants.
- **Incidence of anemia among pregnant women.** This indicator will measure improved consumption of iron-rich food during pregnancy. Because of the expense and logistical difficulty of blood sampling, this indicator will not be reported again until the end of the project.

See the CRS Health Logframe in Appendix B for a complete list of output level indicators. Once the indicators were agreed upon, the Project Manager was given the target worksheet to complete for all indicators. Since analysis of the baseline survey has not been completed, the target worksheet will be forwarded to Atlantic Resources Corporation by March 15, 1993.

### **Current Assessment of Strengths and Weaknesses**

CRS now has fairly reliable baseline data on purpose level indicators. However, throughout the course of Atlantic Resources Corporation's work with the Project Manager, it was apparent that he still lacks an understanding of the usefulness of the logframe and the importance of regular data collection for monitoring performance. As one consequence, one of the unresolved issues concerns purpose level reporting. CRS still has no plans to gather purpose level data, believing that purpose level measurement will require a repetition of the costly, overblown baseline survey. The Project Manager was asked to plan a small-scale survey to measure purpose indicators only, using a smaller sample. Since the Project Manager expects no impact at the end of the first year, it is recommended that purpose level data be collected at mid-term. He was asked to demonstrate to Atlantic Resources Corporation and AID the methodology of this smaller scale survey. He is currently very busy with project implementation, the baseline survey, and other obligations and will probably need some months before he can devote the necessary time to this task.

### **Further Work Needed to Improve Project Monitoring**

CRS could benefit from direct assistance in improving its project planning, scheduling, and management capabilities. A consultant could work directly with the Health Project Manager to: examine the annual implementation plan and address any deficiencies, train the Project Manager in planning/management techniques, review and streamline the data collection/storage system. This should be done only after analysis of the baseline survey is complete as the survey will bring to light the health issues that need to be addressed. Such assistance would serve to streamline project activities, reduce the PM's workload, and ensure the success of this project.

## **E. SEMI-ANNUAL REPORT REVISIONS**

Proposed revisions in the SAR guidelines were presented at the workshop. As mentioned above, discussion of the guidelines was terminated early because of a snowstorm. However, lengthy discussions were held with each PVO to obtain feedback on the proposed revisions, and on general SAR issues. All PVOs welcomed the revisions and indicated that they felt the new guidelines are simpler and clearer. The issues raised by the PVOs that are noted below have been addressed in the latest draft of the SAR guidelines (see Appendix C).

In the course of the PVO discussions on the SAR revisions, several issues arose that require clarification. These issues should be addressed and resolutions should be incorporated into the SAR guidelines as appropriate. AID should finalize the SAR guidelines as soon as possible. PVOs are anxious to receive the new guidelines to use in preparing their May 1 SAR. It was explained to them in Jerusalem that the next SAR would test the new guidelines.

### **Timing and Timeliness of the SAR**

All PVOs except ANERA indicated that, under normal circumstances, they should not have difficulty submitting their SARs on time. PVOs whose last SAR was late indicated that the lateness was due to special one-time circumstances that would not be repeated. Several PVOs mentioned that their SARs were delayed at their home offices. ANERA indicated it needs at least two months between the end of the reporting period and the submission date. Atlantic Resources Corporation does not agree with this conclusion and feels that the long period of time requested by ANERA is due to a misunderstanding of the level of information necessary for project monitoring and reporting to AID.

The timing of the SAR reporting period is also not a problem for most PVOs. SCF initially complained that the reporting period was inconvenient for them because it did not correspond to their quarterly report dates, but this complaint was withdrawn when the one month lag time was explained to them. Apparently, SCF did not realize that the end of the reporting period and the due dates differed by a month. ANERA is the only PVO with problems with SAR submission dates. Their fiscal year is June 1 to May 31 and thus does not correspond with the SAR reporting periods. They would prefer that the reporting periods correspond with their quarters.

As currently defined, reporting on output indicators is to occur semi-annually, while reporting on purpose level indicators will occur only once each year. PVOs were asked to indicate which SAR reporting period would be best for them for purpose level reporting. There was considerable difference among PVOs on this issue, with SCH, SCF, CRS, and ANERA indicating they would prefer to report in November and the YMCA and CDP with a preference for May reporting.

The final issue on SAR timing was raised by several PVOs who are starting up new projects and/or ending old ones. SCF did not submit a SAR for the last reporting period because their project had only been under way two months. The CRS Village Health Project faced the same situation. Other PVOs do not want to switch reporting formats for projects that are ending in the next reporting period. All PVOs were confused on how long after the end of a project reporting should continue and on what the real definition of "final" is in AID terminology.

***Issues to be Resolved:***

- Is it important to AID that all PVOs submit SARs at the same time for the same reporting period, or could reporting dates differ among the PVOs?
- Will it be acceptable for PVOs to report on purpose level indicators in the May or November report as more convenient to them?
- How many months need to have passed in a new project to initiate the SAR process?
- Is it acceptable to use the old SAR format for projects that are ending soon?
- How long after a project officially ends should monitoring and reporting continue?
- What is the definition of the time period when the final report is due?

**VAT and Customs Recovery**

All PVOs indicated that VAT and customs recovery were extremely problematic due to the ad hoc Israeli procedure for reimbursement. When VAT invoices are reimbursed, the Israeli government gives a lump sum reimbursement, without indicating what (which invoice) the reimbursement is for, so PVOs cannot match invoices with reimbursements. Some PVOs were eager to point out to AID that not all items on which VAT is charged are reimbursable, such as services, amounts under \$100, and some things bought for local organizations.

Discussion of the VAT problem revealed that while there is agreement among the PVOs that the VAT issue is troublesome, many PVOs revealed procedures that had enhanced their recoveries and/or their reimbursement process, such as submitting duplicate copies of the invoice.

***Issues to be Resolved:***

- AID should promote sharing ideas and methodology on the VAT issue to ease the burden of reimbursement for the PVOs.

**Financial Reporting**

While all PVOs were eager to have financial reporting guidelines clarified, and most (all except ANERA) felt that the new financial reporting formats were feasible, all asked for a clarification of terms for the line items.

***Issues to be Resolved:***

- Does AID wish administrative costs to go on the financial component reporting sheet?
- Do the two reporting sheets need to total to the same amount?
- Where do regular staff salaries and overhead go in the component reporting sheet? Do they belong on this sheet?
- Does AID really want reporting of overhead and/or indirect costs?
- Should line items for financial reporting be the same in the grant conditions and/or cooperative agreement, the logframe submitted in the proposal, and the SAR financial reporting sheet?
- If line items for financial reporting in the SAR differ from the cooperative or grant agreement, will amendments to that agreement be necessary?
- AID must define with precision the categories for financial reporting in the SAR guidelines.

**Gender Equity**

The table and section on gender equity were added to the SAR guidelines to reflect the fact that PVOs did not specifically address data collection to illustrate gender equity in their current agreements. Therefore, they may not be able to report gender specific data on all indicators.

***Issues to be Resolved:***

- AID should develop some criteria for gender specific reporting and insist that it be addressed in future proposals.

**Reporting on Overlapping Projects**

Several PVOs noted that they are having trouble determining how to report in the SAR on projects that are ending, but being replaced by new projects with some overlap. PVOs definitely do not want to do two SARs. The suggestion has been made to report on overall progress when the purposes and activities are essentially the same in a combined manner in the body of the SAR, but to separate project financial reporting in the expenditure section.

***Issues to be Resolved:***

- How does AID want to handle reporting on overlapping projects?

## **F. PVO SUGGESTIONS TO IMPROVE PROGRAM**

Prior to departing for Jerusalem, the consultants were asked to specifically seek suggestions from PVOs on what AID/Washington and AID/WB/G could do to improve planning, monitoring, reporting requirements, and overall information flow for PVO projects. A number of suggestions were offered, with a great deal of similarity among the PVOs. They are listed below without reference to the PVO(s) making the suggestion.

- Continuous monitoring of the logframe assumption "No serious disruptions from occupation interventions or political tensions/constraints" with more active participation by AID (and Embassy) officials in support of PVO dealings with intransigent Israeli officials regarding implementation of officially approved U.S. government program development initiatives and project activities.
- Provide prompt responses to questions and conditions; things often take too long to work out.
- Give more notice when scheduling AID field trips. Focus more on impact evaluation in field evaluation, talk to more people (beneficiaries and local PVO staff) instead of just "seeing things." Establish protocol for field visits so that all PVOs understand what is expected of them. Provide feedback from AID after the visit.
- Clarify program strategy as it relates to PVO projects. Provide more specific guidelines for the type of projects AID is looking to fund. Monitor program strategy with standardized indicators across all PVOs so it is evident what each PVO project contributes.
- Develop new guidelines for project proposals.
- Develop clear reporting procedures (who, what, when, and at what level).
- Send fewer visitors; overall far too much time is spent on visitors.
- Share information on development ideas and on other activities funded by AID in the area.
- Facilitate information sharing among PVOs, possibly papers, proposals, SARs. (Note was made, however, of the problem should such documents get into the hands of the Israelis.) There is not much redundancy and overlap among PVOs, but it does exist. Increased coordination would reduce it.
- Provide guidance on a standard lexicon for PVO use when reporting to or corresponding with AID. Currently many different terms are used interchangeably, such as program, project, sub-project, and activity.
- Improve coordination between AID/W and its personnel in-country so that AID "speaks with one voice" and conflicting instructions to the PVOs are avoided.
- Recognize that some data gathering, particularly establishing benchmark data, often

- **Recognize that some data gathering, particularly establishing benchmark data, often requires a considerable investment in time, effort, and expense, which can divert PVOs from their operational objectives. Furthermore, these are tasks for which PVOs are not always adequately staffed, equipped, qualified, or sufficiently well funded to undertake.**
- **The "Buy America" requirement causes delays in project implementation. Greater flexibility in procurement is needed.**

**AID will address these issues with the PVOs, although at this point in time a specific format has not been established.**

## **G. MONITORING SYSTEM FOR AID/WEST BANK/GAZA**

Two issues arose in early discussions with the AID/West Bank monitor that were not included in the scope of work for the consultancy but which were seen to be of critical importance to effective monitoring and were therefore addressed to the extent possible.

The first of these was the continuing confusion in terminology among the PVOs and between AID and the PVOs. To obtain some standard terminology, a diagram of project structure was drawn up for each PVO with specific illustrations of the use of terms, including program strategy, PVO grant/project, component, subcomponent, activities, and activity sites. To help AID decide on the level of reporting required, the number of items at each level were also collected. These project structure diagrams are included in Appendix D. Both the PVOs and the AID monitor indicated that these diagrams would be extremely helpful in eliminating the confusion in terminology. However, the length of time taken to prepare the charts, and the fact that even now some of the information remains to be completed, is a strong testimony to the degree of confusion that reigned in terminology. It is recommended that these project structure diagrams be included in PVO proposals so that, from the start, terminology is clear.

The second issue that arose in initial meetings with the AID monitor for the West Bank was the need to develop a system to enhance the monitoring of PVO programs in the field. Discussions about that system led to production of a draft system design (see Appendix E). The system design should be finalized as soon as possible with input from both AID monitors. It would be most appropriate to build a database with provision for input of data both from the SAR and field visit reports. The basis for the database would be semi-annual activity reporting by PVOs in accompaniment to the SAR. Electronic input of data from PVOs will be built into the design, thus reducing or eliminating the need for paper reporting on activities. A consultancy is scheduled for the end of April/early May to complete the design and implementation of the activity monitoring system.

The AID monitor sees this activity reporting system as a replacement for the quarterly report. This type of reporting and the system in general were discussed with the PVOs. All PVOs were receptive to the idea and did not feel they would have much trouble complying. All were more than grateful to be rid of the quarterly reports.

## **H. SUMMARY, CONCLUSIONS, AND NEXT STEPS**

A chart summarizing current PVO status on monitoring is presented on page 29. All team members agreed that tremendous progress was made during the three weeks in Jerusalem on increasing general understanding and acceptance of monitoring methodology. Most PVOs now see the need to monitor their projects internally to promote effective management. Many PVOs have asked for help in setting up manual and/or automated systems to enhance their project monitoring. Care will have to be taken to allocate the limited resources of the West Bank/Gaza Monitoring Project to those activities and/or PVOs most in need of attention, but it is imperative that the initiative that has begun not be dropped. Tasks to continue the momentum include:

- Work with AID/W to finalize revisions in the SAR guidelines.
- Review May 1 SARs in accordance with new guidelines and provide help to PVOs as necessary.
- Follow up with PVOs on March 15 due date for indicator targets.
- Follow up PVO February field trip to discuss results of consultancy and needs for further assistance: CRS, ANERA, ACDI, AMIDEAST.
- Work with PVOs that have requested additional help (as appropriate and financially feasible) under the West Bank/Gaza Monitoring Project. These PVOs include CRS, SCH, CDP, and AMIDEAST, and ANERA.
- Prepare scope of work and identify consultant for AMIDEAST consultancy. Work with AMIDEAST in Washington, D.C. to initiate discussion of logframe.
- Offer additional workshops on monitoring topics for PVOs (conduct a survey to determine interest and need).
- Revise guidelines for proposal submission including budget (proposal budget, grant agreement, logframe, and reporting should reflect the same budgetary categories).
- Develop flowchart and specifications for an AID/WB/GAZA monitoring system that ties together logframe, SAR, targets, activity, and financial reporting and prepare a manual that outlines procedures for effective monitoring using this system.
- Finalize system specifications for the activity/field monitoring system, complete programming of the system, install in Jerusalem and Tel Aviv and train users, and work with PVOs to develop electronic formats for data input.
- Begin thinking about standardizing some indicators across PVOs so that they can be accumulated to the WB/Gaza Program level (maybe at the sector level--for both indicators and funding). This would ensure that PVOs represent AID programming strategy and help PVOs target their proposals more directly to the AID strategy.

- **Complete financial tracking system.**
- **Continue to work on standardizing terms.**
- **Prepare analysis of monitoring systems currently in place with recommendations for further work needed.**

**SUMMARY OF PVG STATUS ON MONITORING AID FUNDED PROJECTS**

	AMDEAST	ANERA	CDP	CRS-Rural Devel.	CRS-Health	SCF	SCH	YMCA
Logframe	Not completed-will be completed in April when new project is designed	Nearly completed at summary level	Completed	Will be finalized in May when new project proposal is completed	Completed	Not completed. Purpose level indicator needs to be developed and MOV and assumptions noted	Completed	Completed
Targets	Will be completed in April after logframe is completed	Most targets can be completed by May	Will send by March 15	Will be finalized in conjunction with NGO counterparts when logframe is completed	Will try to send by March 15, or as soon as data from baseline survey are available	Targets have not been established. Have been asked to send targets by March 15	Will send by March 15	Understand concept - will have finished by March 15
Activity Monitoring	Sees no problem in activity reporting	Voluminous-activity sites. Has system to report on activities	May have some problem reporting activities because they have no computerized monitoring system	Have computerized database for current RDIII activities. Can do similar database for new project activities	Should not find activity reporting difficult-did not find previous quarterly report difficult	Should be few problems in activity reporting because they have all data; potential problem in defining funding source for activities	No problems	Does not see any problem, but will need to have approved by YMCA home office
Defined System for Monitoring That Goes from Logframe to SAR	Not in place-would need help in developing	Not in place-would like help in developing	Not in place-would like help in developing a complete MIS for monitoring projects	No	No	No	No, but plans to develop one	Not in place. Could develop on its own
Data Collection Procedures for Monitoring	Will be completed during consultancy	Not in place -- needs help in designing and implementing	About 80% in place; has audit system for cooperatives.	Not yet developed	Not in place--no systematic procedures are developed for collecting data for indicator reporting	PRA and PEMS System in place	Good data collection procedures in place	Good data collection procedures in place
Computer Systems in Place for Monitoring	Has extensive data base for activity monitoring	Some -- needs help in system design, not programming	None; has requested help	None	None	No computerized systems; does not want help	Will develop for indicators and SAR	Does not need any help
Software Used	PARADOX	PARADOX, Lotus, Foxpro	Lotus, PARADOX	Lotus, CRS software	Lotus, CRS software	Lotus	WP 5.1	Lotus, SPSS
New SAR Guidelines	Sees no problem in getting SAR in on time and in accordance with new guidelines	Can comply-would like reporting dates changed and lag time increased to two months	Sees no problem with new guidelines. May have problem getting financial reporting in on time	No problem if financial reconciliation is worked out with new computerized system	Has discussed SAR guidelines; will probably have trouble with indicator monitoring	Sees no problem in getting SAR in on time or with new guidelines	No problem in timing or with revisions	Sees no problem in complying with new guidelines
Overall Understanding of Monitoring	Not very good--sees only as an AID need	Very good at top levels of management. Sees value for internal project monitoring	Very good -- has learned a great deal through workshop and actual development of logframe	Good appreciation	Very sketchy understanding of project monitoring -- does not really see or understand the need	Has good understanding of the need for project monitoring, but not much appreciation for the value of the logframe	Good understanding of project monitoring, but not much understanding of the logframe concept	Very good

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**APPENDIX A**

**CONSULTANCY SCHEDULE**

**PRE-POST LOGFRAME WORKSHOP ASSESSMENT**

**TARGET SETTING WORKSHEET**

**WORKSHOP PARTICIPANTS**

## **SCHEDULE OF ACTIVITIES**

<b>February 8-9</b>	<b>Logframe Workshop</b>
<b>February 9</b>	<b>Presentation of SAR Revisions</b>
<b>February 10-26</b>	<b>ANERA (Kenneth Smith)</b> <b>CRS/IRD-CB (Sandra Bertoli)</b> <b>ACDI, CRS/Village Health, SCF, SCH, YMCA</b> <b>(Susan Exo and Ken Lizzio)</b>
<b>February 12</b>	<b>Discussion of AID/J monitoring requirements with Karen Turner and Gaby Aboud, AID</b>
<b>February 15</b>	<b>Meeting with Bruce Stanley and staff, AMIDEAST</b>
<b>February 16</b>	<b>Meeting with Randall Harshbarger and staff, SCF</b> <b>Meeting with Michel Sansur, CRS</b>  <b>Meeting with Michel Sansur, CRS Health Project Manager</b>
<b>February 17</b>	<b>Meeting with Lance Matteson, ANERA</b> <b>Meeting with Karen Turner, U.S. AID</b>
<b>February 22</b>	<b>Meeting with Randa Hillal and staff, YMCA</b>
<b>February 23</b>	<b>Meeting with Arselan Al-Agha, SCH</b> <b>Meeting with Randall Harshbarger, SCF</b>
<b>February 24</b>	<b>Meeting with CRS staff</b> <b>Exit meeting with CDP staff</b>
<b>February 25</b>	<b>Meeting with Wafa Dajani, ANERA</b> <b>Meeting with Norm Olson, U.S. Embassy/Tel Aviv</b> <b>Exit Meeting with Michel Sansur, CRS/Village Health Project</b>
<b>February 26</b>	<b>Exit Meeting with Lance Matteson, ANERA</b> <b>Exit Meeting with Karen Turner, U.S. AID</b>

**JERUSALEM, 8-9 FEBRUARY 1993**

**PARTICIPANT SELF-ASSESSMENT**

<b>RATING SCALE:</b>		<b>CRITERIA</b>				
<b>A =</b>	<b>UNAWARE/UNSKILLED</b>	<b>I DON'T KNOW ANYTHING</b> about this topic.				
<b>B =</b>	<b>MINIMAL AWARENESS/ RUDIMENTARY SKILL</b>	<b>I HAVE HEARD ABOUT</b> this topic, but <b>DON'T KNOW ENOUGH</b> about it <b>TO DO IT</b> or <b>TO USE IT</b> .				
<b>C =</b>	<b>PARTIAL KNOWLEDGE/ SEMI-SKILLED</b>	<b>I HAVE SOME KNOWLEDGE</b> on this topic and/or <b>HAVE WORKED WITH IT</b> in the past, but <b>COULD NOT DO IT NOW</b> without further study, reorientation instruction &/or assistance.				
<b>D =</b>	<b>WORKING KNOWLEDGE &amp; SKILL LEVEL</b>	<b>I HAVE A GOOD WORKING KNOWLEDGE</b> of this topic and <b>CAN DO ROUTINE ASPECTS OF IT NOW</b> without further assistance				
<b>E =</b>	<b>EXPERT KNOWLEDGE/ HIGHLY SKILLED</b>	<b>I AM HIGHLY COMPETENT &amp; EXPERIENCED</b> in this topic and -- if requested -- <b>COULD ASSIST THE INSTRUCTOR</b> during the workshop as a resource person <b>TO TEACH OTHERS</b> .				
<b>TOPIC</b>		<b>Percentage (%) of Participants at Each Level</b>				
		<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>
<b>Means-Ends Analysis</b>	<b>Before</b>	30	26	33	4	4
	<b>After</b>	8	38	33	17	
<b>Objective Trees</b>	<b>Before</b>	22	37	11	22	7
	<b>After</b>	8	21	38	29	4
<b>Blueprint Project Management</b>	<b>Before</b>	41	30	7	22	
	<b>After</b>	17	21	21	38	
<b>Learning Process Project Management</b>	<b>Before</b>	30	30	26	11	4
	<b>After</b>	8	29	25	38	
<b>LOGICAL FRAMEWORK</b>	<b>Before</b>	4	15	48	22	7
	<b>After</b>			17	67	4
<b>Goals</b>	<b>Before</b>	7	7	48	33	4
	<b>After</b>			25	58	17
<b>Purpose</b>	<b>Before</b>	7	7	48	33	4
	<b>After</b>			25	63	13
<b>Outputs</b>	<b>Before</b>	7	11	44	33	3
	<b>After</b>			13	75	13
<b>Inputs</b>	<b>Before</b>	7	15	37	33	4
	<b>After</b>			8	71	13
<b>Objectively Verifiable Indicators</b>	<b>Before</b>	15	19	26	37	4
	<b>After</b>		4	25	67	4

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TOPIC		Percentage (%) of Participants at Each Level				
		A	B	C	D	E
Proxy Indicators	Before	33	30	7	19	4
	After		29	33	38	
BOPS / EOPS	Before	37	22	7	26	4
	After		13	38	50	-
Targeting	Before	19	19	28	30	4
	After		8	21	71	
Means of Verification	Before	15	19	37	26	4
	After		4	21	67	8
Assumptions	Before	7	22	37	30	4
	After			29	63	8
Development Hypothesis	Before	19	22	37	19	4
	After	4	8	38	50	
Hierarchy of Objectives	Before	22	30	22	22	4
	After	4	8	29	58	
Bar/Gantt Charts	Before	26	41	11	19	4
	After	4	54	21	17	4
Milestone Charts	Before	44	19	26	7	4
	After		50	29	25	
PERT/Critical Path Networking	Before	56	19	15	7	4
	After	13	42	21	25	
Financial Monitoring	Before	26	15	22	26	11
	After		25	25	42	4
Using Micro-computers	Before	22	19	22	26	11
	After	21	33	8	21	17
Using Lotus 1-2-3	Before	26	22	15	22	15
	After	33	25	13	17	13
PC Logframe	Before	41	26	19	11	0
	After	17	33	17	17	4

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# Monitoring and Evaluation Workshop

February 8-9, 1993  
Jerusalem

## ***PARTICIPANT LIST***

### **ACDI/CDP**

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Thomas LaQuey  
Joseph Nesnas  
Carol Yee

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### **AMIDEAST**

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Michel Sansour

### **SCE**

Randall Harshbarger  
Ali Mansour

### **SCH**

Arselan Al-Agha  
Nasr Al-Draimly

### **YMCA**

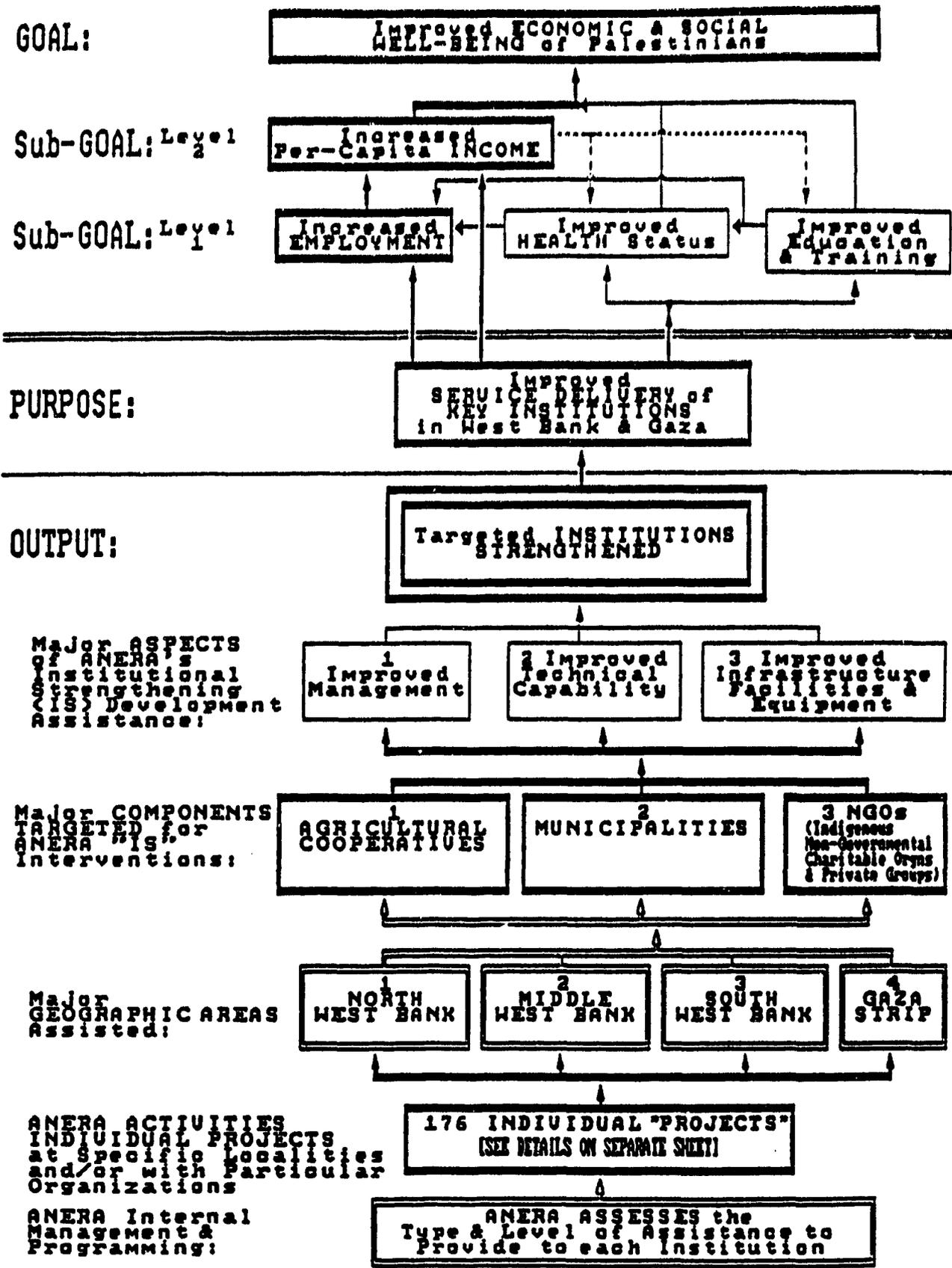
Anwar Abdelal  
Nader Abu Amsha  
Michel Asfour  
Ismael Hamdan  
Randa Hilal  
Adnan Shelaldeh

**APPENDIX B**

**LOGFRAMES AND PVO DATA RELATED TO LOGFRAMES**

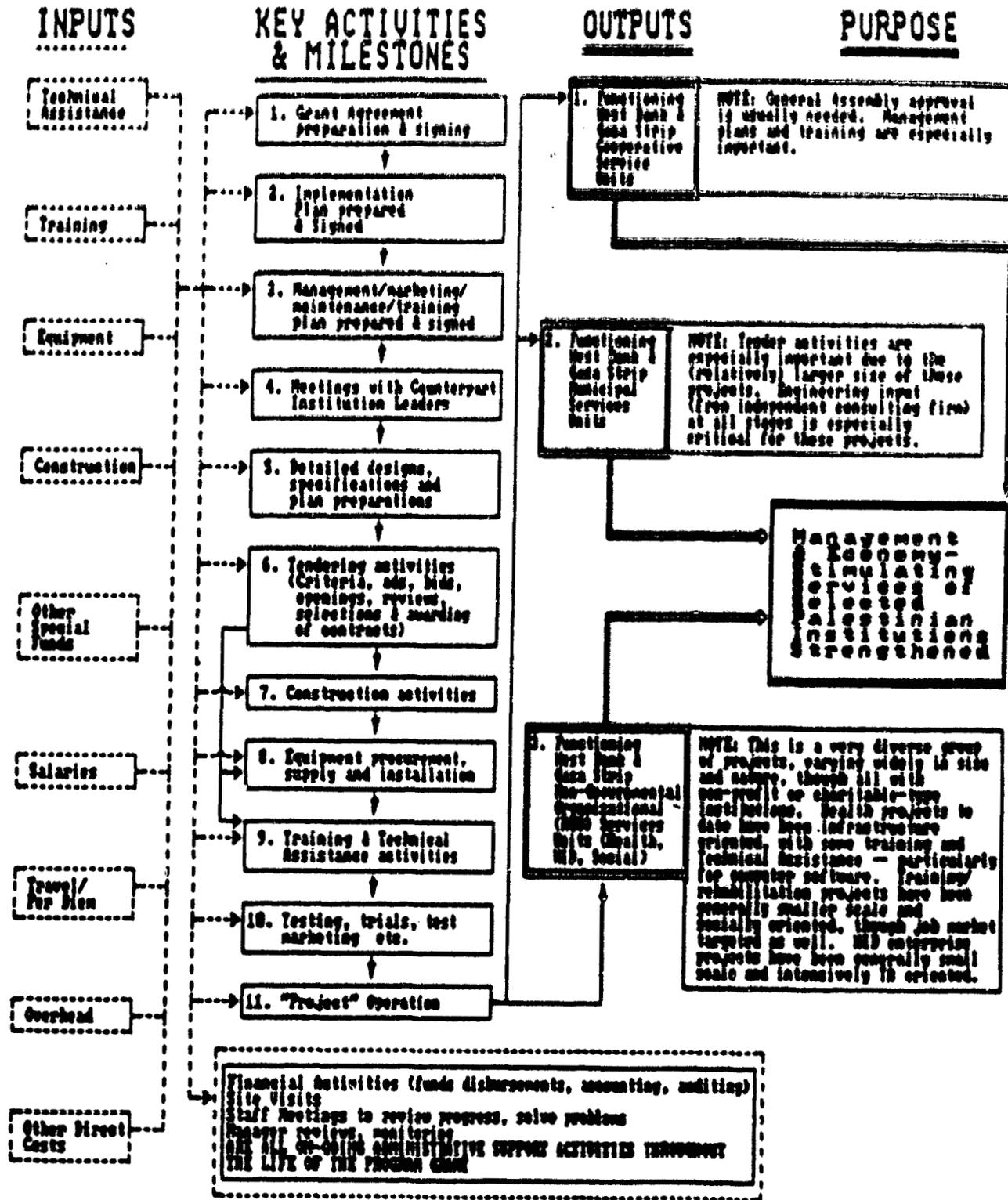
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# ANERA OVERALL WBG PROGRAM OBJECTIVE TREE



ANERA, 25 Feb 93

# ANERA OVERALL WBG PROGRAM LOGFRAME FLOW CHART



ANERA, 26 Feb 93

<p><u>NARRATIVE SUMMARY</u> <u>GOAL</u> Improved economic and social well-being of Palestinians in the West Bank and Gaza</p>	<p><u>OBJECTIVELY VERIFIABLE INDICATORS</u></p>	<p><u>MEANS OF VERIFICATION</u></p>	<p><u>ASSUMPTIONS</u></p>
<p><u>PURPOSE</u></p> <p>1. Management and economy-stimulating services of selected Palestinian institutions strengthened</p>	<p><u>EOPS</u></p> <p>1.1. New jobs (full-time equiv.) generated 1.2. Percentage of females in new jobs 1.3. Number of direct beneficiaries served by the targeted institutions 1.4. Percentage of female direct beneficiaries 1.5. User fees paid to targeted institutions for ANERA-assisted project services 1.6. Sustainability -- percentage of assisted institutions operating at satisfactory level</p>	<p>External survey - conducted at the end of project</p> <p>ANERA coordinator inspection of the targeted institutional records</p> <p>ANERA coordinator inspection of the targeted institutional records</p> <p>ANERA coordinator "judgment" &amp; external evaluator assessment</p>	<p>Local institution boards and staff receptive to new methods</p> <p>No serious internal institutional conflicts</p> <p>No serious disruptions from occupation interventions or political tensions/constraints</p>
<p><u>OUTPUTS</u></p> <p>1. Functioning Agricultural Cooperative Service Units</p> <p>2. Functioning Municipal Services Facilities</p> <p>3. Functioning NGO Services units for Health, WID, Social</p>	<p>1.1. Number of Agcoops assisted 1.2. # of full time paid employees operating ANERA-assisted services 1.3. Percent of Agcoops with acceptable financial statements 1.4. Total revenues (thousands of dollars) 1.5. Percent of milestones completed 1.6. Percent of Agcoops assessed "satisfactory"</p> <p>2.1. Number of municipalities assisted 2.2. # of full time paid employees operating Anera-assisted services 2.3. Total revenues (thousands of dollars) 2.4. Percent of milestones completed 2.5. Percent of municipalities assessed "satisfactory" number of milestones completed</p> <p>3.1. Number of NGOs assisted 3.2. # of full time paid employees operating ANERA-assisted services 3.3. Percent of NGOs with acceptable financial statements 3.4. Total revenues (thousands of dollars) 3.5. Percent of milestones completed 3.6. Percent of NGOs assessed "satisfactory"</p>	<p>ANERA technical consultant records Assisted institution records</p> <p>ANERA technical consultant judgement</p> <p>Assisted institution records</p> <p>ANERA technical consultant records</p> <p>ANERA technical consultant judgement</p> <p>ANERA technical consultant records</p> <p>Assisted institution records</p> <p>Assisted institution records</p> <p>ANERA technical consultant records</p> <p>ANERA technical consultant judgement</p> <p>ANERA technical consultant records Assisted institution records</p> <p>ANERA technical consultant judgement</p> <p>Assisted institution records</p> <p>ANERA technical consultant records</p> <p>ANERA technical consultant judgement</p>	<p>PVO staff can get permits needed to move to project sites</p> <p>Counterpart funds will be produced</p> <p>Counterpart institutions able to get needed licenses</p>

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## **RATIONALE FOR THE ANERA LOGFRAME INDICATORS**

### **PURPOSE LEVEL**

**Narrative Summary:** Management and economy-stimulating services of selected Palestinian institutions strengthened.

**Indicators:**

- 1A. New jobs (full-time equivalent) generated
- 1B. Percentage of females in new FTE jobs
- 2A. Number of direct beneficiaries served by the targeted institutions
- 2B. Percentage of female direct beneficiaries
3. User fees paid to targeted institutions for ANERA-assisted project services. (This is an indicator of the strength of the institution in that users value their services and are willing to pay for them)
4. SUSTAINABILITY -- Percentage of assisted institutional services units operating at a "Satisfactory" level

**Means of Verification:**

1. External Survey -- conducted at the end of the project
2. ANERA Coordinator inspection of the targeted institutional records
3. ANERA Coordinator inspection of the targeted institutional records
4. ANERA Coordinator "judgment," and External Evaluator assessment

### **OUTPUT LEVEL**

**Narrative Summary:** 1. Functioning WBG Agricultural Cooperative Service Units

**Indicators:**

- 1A-1. Number of Agricultural Cooperatives assisted (scope and extent of Institutional Strengthening Outreach Program)
- 1A-2. Number of full-time paid employees operating ANERA-assisted services. (Full-time paid employees (FTPE) is a key indicator of strength and stability vs. ad hoc volunteers -- but FTPEs must be analyzed in conjunction with services delivered as well as the size of the beneficiary group)
- 1A-3. Percent of Agricultural Cooperatives with timely acceptable financial statements. (Without effective financial management, no service delivery institution is likely to be strong or prevail for long.)
- 1A-4. Total revenues (thousands of dollars). (Crude but relatively easy indicator of the institution's ability to pay for employees, operations, and service delivery programs. Also, unlike net income, this data is readily aggregated across dissimilar classes of institutions -- such as cooperatives, municipalities, and NGOs)

- 1A-5. Percent of Milestones Completed.<sup>1</sup> (Indicator of ANERA progress in the process of strengthening the assisted institution)
- 1A-6. Percent of Agricultural Cooperatives assessed as "Satisfactory."<sup>2</sup> (ANERA's "on-the-ground" best technical "gut feeling" about how things are going)

**Narrative Summary:** 2. Functioning Municipal Services Facilities

**Indicators:**

- 2A-1. Number of municipalities assisted
- 2A-2. Number of full-time paid employees operating ANERA-assisted services
- 2A-3. Percent of municipalities with timely acceptable financial statements
- 2A-4. Total revenues (thousands of dollars)
- 2A-5. Percent of Milestones completed
- 2A-6. Percent of municipalities assessed as "Satisfactory"

**Narrative Summary:** 3. Functioning WBG NGO Services Units for Health; WID and other Social Services for Employment Generation

**Indicators:**

- 3A-1. Number of NGOs assisted
- 3A-2. Number of full-time paid employees operating ANERA-assisted services
- 3A-3. Percent of NGOs with timely acceptable financial statements
- 4A-4. Total revenues (thousands of dollars)
- 5A-5. Percent of Milestones completed
- 6A-6. Percent of NGOs assessed as "Satisfactory"

**Means of Verification:**

- 1A-1; 2A-1; 3A-1: ANERA Technical Consultant records
- 1A-2; 2A-2; 3A-2: Assisted institutions records
- 1A-3; 2A-3; 3A-3: ANERA Technical Consultant judgment
- 1A-4; 2A-4; 3A-4: Assisted institutions records
- 1A-5; 2A-5; 3A-5: ANERA Technical Consultant records
- 1A-6; 2A-6; 3A-6: ANERA Technical Consultant judgment

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<sup>1</sup>ANERA plans to review each of its site-specific "project" implementation plans and restructure them in a simplified PERT/CPM-type format. Several key milestones can then be identified in each project for implementation monitoring. The total number of milestones per project will be the basis for computing the percentage completed and setting time-phased targets. The aggregate of these milestones will be reported against this logframe.

<sup>2</sup>i.e., Functioning in a satisfactory manner given the stage of implementation. The criteria for "satisfactory" and the schedule will be developed and defined by ANERA Technical Consultants in conjunction with the Target Beneficiary institutions

<u>NARRATIVE SUMMARY</u> <u>GOAL</u> 1. Improved social well-being of Palestinians in the West Bank	<u>OBJECTIVELY VERIFIABLE INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTIONS</u>
<u>PURPOSE</u> 1. Improved health among pregnant women, children under three and their families in target West Bank communities	<u>EOPS</u> 1.1 incidence of diarrhea among children 0-3 1.2 incidence of respiratory problems among children 0-3 1.3 incidence of low weight for age among children 0-3 1.4 incidence of anemia among pregnant women	Baseline survey  Mid-project mini-survey  EOP survey	Stable social and economic conditions in target communities
<u>OUTPUTS</u> 1. Health educators have upgraded skills and knowledge in preventive health practice  2. A community-based primary health care training program is upgraded  3. Villages are more self-sufficient in addressing their health-related problems	1.1 % passing course exam 1.2 %health care workers practicing more advanced health care techniques (emergency first aid, identifying high risk prenatais)  2.1 % infants breast-fed exclusively for at least the first four months 2.2 % mothers counseled who: - prepare iron-rich food - take iron tablets during pregnancy 2.3 % mothers counseled who prepare protein-rich food 2.4 % mothers counseled using ORT correctly 2.5 % pregnant women counseled changing traditional rearing practices (salting, kohl, swaddling)  3.1 % villages with health committees formed 3.2 % educators whose salaries are paid by village-level organizations	Training records  Quarterly supervisory evaluation  Health educators' quarterly reports         Field Visit Reports  Village organization reports	Adequate supply of trainable health workers  Women are willing and able to participate in health education  Village societies continue to support the health educators' salaries during the period of upgrade training

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Will not be measured again until EOP.

**LOGICAL FRAMEWORK**

CRS/Integrated Rural Development/Capacity Building 2/26/93

<p><b><u>NARRATIVE SUMMARY GOAL</u></b></p> <p>Improved economic &amp; social well-being of Palestinians in the West Bank</p>	<p><b><u>OBJECTIVELY VERIFIABLE INDICATORS</u></b></p>	<p><b><u>MEANS OF VERIFICATION</u></b></p>	<p><b><u>ASSUMPTIONS</u></b></p>
<p><b><u>PURPOSE</u></b></p> <p>1. Increased capacity of local Palestinian organizations to plan &amp; manage rural development activities</p> <p>2. Improved health of rural community</p> <p>3. Increase production of agricultural &amp; manufactured goods</p> <p>4. Increased employment and income</p>	<p><b><u>EOPS</u></b></p> <p>1.1 Selected communities have effectively functioning VDCs</p> <p>1.2 Selected NGOs work effectively at village level with VDC(s)</p> <p>2. % reduction in water borne disease/amoebic dysentery among children below 3 years</p> <p>3.1 % increase in production of crops harvested from land reclaimed &amp; land benefiting from increased water resources</p> <p>3.2 % increase in production from new/expanded businesses</p> <p>4. % increase in women engaged in income generating activities</p>	<p>1.1 Assessment by outside evaluator, NGO, VDCs, community sample</p> <p>2. Reports from local clinics and laboratories</p> <p>3.1 Farmers' records &amp; agricultural extension estimated</p> <p>3.2 Business records</p> <p>4. PRA estimates of women's activities; assessment of community representative H-H panel</p>	<p>Political stability and non-intervention in development activities by authorities</p> <p>Clinics and laboratories are cooperative</p> <p>No epidemics/external environmental contamination</p> <p>No population influx.</p> <p>Economic situation stable or improved</p> <p>No climatic disruptions</p> <p>Markets remain viable.</p> <p>Affordable inputs available on time</p> <p>No intervention by authorities</p>

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<b>OUTPUTS</b>			
1.1 Participatory community planning & management of development activities	1.1.1 Democratic membership in the VDC representing the village 1.1.2 # VDCs able to plan, implement, monitor, evaluate and finance activities 1.1.3 # VDCs taking the initiative for developing locally financed activities 1.1.4 # VDCs using participatory decision making process 1.1.5 # communities with increased involvement of minority groups and women in decision making process 1.2.1 # Cooperative local counterpart organizations able and willing to plan, implement, record, report, monitor and evaluate. 1.2.2 # Technically competent counterpart organizations with participatory involvement of community in all aspects of development activities	1.1 Panel of community representatives Self reports of VDCs Users' groups reports Counterpart organization assessments	
2.1 Increased per capita consumption of potable water	2.1.1 Liter/capita/day consumed during summer months	2.1.1 Panel self-reports	2.1.1 Availability of running water in pipes
2.2 Improved sanitation	2.1.2 Decreased cost of water	2.1.2 Estimated cost of purchased water from water tanks and community water systems by the users	2.1.2 Decreased cost of water leads to higher consumption
2.3 Increased environmental community health education	2.1.3 Improved quality of potable water 2.2.1 Outflows from increased # of households go to cesspits 2.2.2 Decreased incidence of cesspit overflow 2.2.3 Increase number and larger cesspits 2.3.1 # rural communities with environmental health education services 2.3.2 Improved quality of water in cisterns	2.1.3 Testing of water samples 2.2 Assessment of surface waste water by experts, VDC, panel of community households 2.3.1 VDC reports 2.3.2 Decrease in fecal coliform in water testing	2.1.3 Improved quality leads to more consumption  Coordination with CRS/VHS and/or other counterparts  Curriculum is available for community environmental health training
3.1 Increased land under agricultural production	3.1.1 # Acres (dunums) of land reclaimed & planted in crops	3.1 Participants/beneficiaries' reports	3.1.1 Reclaimed land is used for plantation
3.2 Increased water for agricultural production	3.1.2 % increase in value of production from reclaimed land	Agricultural extension agent reports	
3.3 Increased production credit provided to small manufacturers	3.2.1 % increase in cubic meters of water for irrigation 3.2.2 % increase in dunums irrigated 3.3.1 # New/expanded small manufacturing enterprises 3.3.2 % increase in value of production of manufactured goods	Counterpart records 3.2.1 PHG reports 3.2.2 Farmers' reports 3.3. Small business records	
4.1 Increased support for women's economic initiatives	4.1 # Women trained in income generating activities 4.2 # Women provided credit for income generating activities	4.1 VDC reports Participatory beneficiary reports	

<u>NARRATIVE SUMMARY</u> <u>GOAL</u> 1. An improvement in the economic well being of Palestinians in the West Bank and Gaza	<u>OBJECTIVELY VERIFIABLE INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTIONS</u>
<u>PURPOSE</u> 1. Targeted cooperatives operate as viable, sustainable businesses which provide needed services.	<u>EOPS</u> 1.1 % of operating cost covered by revenue 1.2 % of coops advancing on schedule to fifth (and final) stage of development	Annual audit CDP records	Cooperatives operating without additional Israeli restrictions on their regular activities
<u>OUTPUTS</u> 1. Cooperatives are effectively organized and practicing cooperative principles. 2. Cooperatives are practicing effective management. 3. Cooperatives possess technical capabilities to deliver needed services. 4. Cooperatives have access to credit and grants.	1.1 cooperative has a democratically elected board setting policies and procedures 1.2 % members attending annual meetings 1.3 # cooperative education courses 2.1 coops prepare annual workplans, budgets, and job descriptions 2.2 coops produce quarterly trial balances and annual itemized balance sheet approved by auditor 2.3 # business management courses 2.4 # contact hours of business management assistance 3.1 % members using services 3.2 # technical courses 3.3 # contact hours of technical services 4.1 # loans to coops 4.2 # grants 4.3 % loans delinquent 4.4 avg loan value 4.5 % total fund loaned	Minutes of General Assembly meetings GDP Records Minutes of General Assembly meetings Annual audit, CDP records CDP records CDP records Cooperative records CDP records CDP records TDC reports	Cooperatives operating without additional restrictions on their regular activities Trainable employees are available Cooperatives are able to purchase needed services and supplies CDP staff travel not restricted Lending system is in place No restrictions on collection via legal process
<u>INPUTS</u> 1. <u>AID</u> 1.1 PERSONNEL/TECHNICAL ASSISTANCE a. Long Term b. Short Term 1.2 TRAINING: Local/Third Cntry/USA a. Long Term b. Short Term 1.3 EQUIPMENT & MATERIALS 1.4 CONSTRUCTION 1.5 SPECIAL FUNDS: Loans/Grants 2. <u>OTHER DONORS</u>	<u>RESOURCES:</u> Person Months and/or \$000's 1.1a \$2,148 672PM 1.1b \$ 581 58 1.2 Local: \$208 1.2b U.S. & Third Country: \$257 1.3 \$1,050 1.4 0 1.5 \$929 Total: \$5,173 0	Project budget, implementation plans Budget, implementation plans Trainees reports Budget Memorandum of Understanding with cooperatives	

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## IMPLEMENTATION PLAN for COOPERATIVE DEVELOPMENT

Targeted Cooperatives	Stage	JAN 1 1992	JAN 1 1993	JAN 1 1994	JAN 1 1995
BEIT JALA OLIVE PRESS	1				
	2				
	3				
	4				
	5				
BEIT LAHIA STRAWBERRY	1				
	2				
	3				
	4				
	5				
ELECTRIC UNION	1				
	2				
	3				
	4				
	5				
JENIN MARKETING	1				
	2				
	3				
	4				
	5				
KHAN YUNIS AG	1				
	2				
	3				
	4				
	5				
OLIVE OIL UNION	1				
	2				
	3				
	4				
	5				
TULKAREM LIVESTOCK	1				
	2				
	3				
	4				
	5				
SOURBEF HANDICRAFTS	1				
	2				
	3				
	4				
	5				

NOTE: As above targeted cooperatives achieve stage three, additional cooperatives will be identified for inclusion in target group.

### MODEL CO-OP

It is a business organization formed by a group of people to better provide themselves with those goods and services at a competitive price whereby their incomes will be increased and the quality of life in their community will be enhanced. It's a co-op that holds annual assemblies, where the members of the board of directors are elected through a democratic process with each member having one vote. It offers the members the opportunity to vote on policies, approve financial statements, and approve plans designed by the board of directors.

1. Has a board of directors who are capable of:
  - a. carrying out the policies approved by the co-op membership.
  - b. developing policies for the manager and staff to follow.
  - c. developing financial statements.
  - d. developing annual budgets for the co-op.
  - e. developing annual workplans for the co-op.
  - f. making regular activities reports to its members.
  - g. meeting on a regular basis to review the co-op activities.
  - h. hiring a manager and staff capable of carrying out the daily activities of the co-op.
2. Has the potential of making a profit.
3. Pays patronage refunds to its members.
4. It is an organization capable of carrying out its own business activities with a minimum of outside intervention.

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**LOGICAL FRAMEWORK**

Save The Children Federation

<u>NARRATIVE SUMMARY</u>	<u>OBJECTIVELY VERIFIABLE INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTIONS</u>
<p><u>GOAL</u></p> <p>Improved economic and social well-being of Palestinians in the West Bank and Gaza</p>			
<p><u>PURPOSE</u></p> <p>Increased self-reliance within targeted communities in the West Bank and Gaza</p>	<p>EOPS</p> <p>Increase in index measuring self-reliance (not yet defined)</p>		
<p><u>OUTPUTS</u></p> <ol style="list-style-type: none"> <li>1. Agricultural facilities/infrastructure are expanded and upgraded</li> <li>2. Water resources are expanded and upgraded</li> <li>3. Increased land under cultivation</li> <li>4. Diversification of cropping into high profit varieties</li> <li>5. Pre-school system is upgraded</li> </ol>	<ol style="list-style-type: none"> <li>1.1 # km. roads constructed</li> <li>1.2 # dunums of cultivated land fenced</li> <li>2.1 # new water catchments (ponds, springs, cisterns) constructed and/or rehabilitated</li> <li>3.1 # dunums of reclaimed land</li> <li>4.1 # seedlings of high profit crops planted</li> <li>4.2 increase in area cultivated in appropriate crops</li> <li>5.1 # pre-school facilities upgraded</li> <li>5.2 # teachers participating in skill upgrading activities</li> <li>5.3 # teachers with upgraded skills (measurement yet to be defined)</li> </ol>		

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**Society For The Care Of The Handicapped  
(2/15/93)**

<u>NARRATIVE SUMMARY</u> <u>GOAL</u>	<u>OBJECTIVELY VERIFIABLE INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTIONS</u>
<p>1. An improvement in the social well being of Palestinians in Gaza</p>			
<p><u>PURPOSE</u></p> <p>1. Handicapped children are prepared for integration into society and at-risk children are prepared for mainstream developmental education.</p>	<p><u>EOPS</u></p> <p>1.1 % handicapped children prepared for higher level programs                      1.2 % handicapped graduates accepted at higher level programs or normal school                      1.3 % at-risk children prepared for normal school                      1.4 % at-risk graduates accepted at normal school</p>	<p>Monthly teacher reports</p>	<p>No restrictions on activities are imposed by Israeli authorities</p> <p>Schools and other educational institutions have room for SCH graduates</p>
<p><u>OUTPUTS</u></p> <p>1. A training program for home teachers is operational</p> <p>2. Targeted children and their mothers receive at home developmental, nutrition, health and hygiene education</p>	<p>1.1 ratio of teachers/teacher-trainees                      1.2 % teachers who receive favorable monthly reports from supervisors</p> <p>2.1 % mothers preparing activity chart                      2.2 % of mothers visited who receive favorable monthly report from supervisor                      2.3 % of mothers counselled who practiced improved health, hygiene, and nutrition                      2.4 % of children progressing on schedule</p>	<p>Project Managers' monthly report</p> <p>Supervisors' monthly report</p> <p>Supervisors' monthly report</p> <p>Teachers' monthly report</p>	<p>Qualified female trainees are available</p> <p>No curfews</p>

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15.

YMCA 2/26/93

<u>NARRATIVE SUMMARY</u> <u>GOAL</u>  Improved economic and social well-being of Palestinians in the West Bank and Gaza	<u>OBJECTIVELY VERIFIABLE INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTIONS</u>  Continuous adequate funding  Relative economic stability  Relative political stability
<u>PURPOSE</u>  1. Increased employment and self-employment of VTC graduates	<u>EOPS</u>  1. % increase in the overall rate of employment of VTC graduates 2. Increase in the rate of graduates employed in learned vocation 3. Increase in the rate of self-employed graduates 4. Increase in the success rate of self-employed graduates (still in business after one year)	Tracer study of 25% of the graduates  Back tracer study of those same 25% of the graduates	Same as above  Willingness of graduates to accept and cooperate with the Unit
<u>OUTPUTS</u>  1. Establishment of good relationships between industry and training centers  2. Self-employed have access to credit and equipment to operate their own businesses  3. Self-employed are managerially skilled and technically assisted to operate their own businesses  4. Enhanced employment and marketability of VTC graduates	1.1 # industries participating in TWI 1.2 # open days and excursions 1.3 % graduates employed through TWI  2.1 # loan recipients a. from YMCA b. from other institutions 2.2 % delinquent loans a. from YMCA b. from other institutions 2.3 # SED equipment borrowers 2.4 % delinquencies on equipment rentals  3.1 # SED graduates 3.2 % SED graduates setting up their own businesses 3.3 # businesses assisted technically  4.1 # graduates who finish TWI 4.2 % technically upgraded graduates employed	6 months reports, program reports and financial reports. An audit in Yr III, monitoring trip in Yr I, and an evaluation in Yr II. Periodic internal monitoring and evaluation	Same as above  Access to VTC's  Research Institute with academic credentials to provide courses in managerial training  AID's prompt action when problems arise regarding their conditions

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**APPENDIX C**

**REVISED SEMI-ANNUAL REPORT GUIDELINES**

## GUIDELINES FOR SAR REPORTING

MARCH 25, 1983

The Semi-Annual Report (SAR) should be submitted to AID before November 1 and May 1 each year, unless otherwise agreed upon with the responsible AID/W Project Officer. All projects covered by grant agreements that have been in operation for more than four months should report according to the format that follows. SARs for projects less than four months old need not conform to this reporting format, but should contain a narrative summary of activities and progress to date. Projects should continue to report in accordance with the November 1/May 1 schedule up to the Project Assistance Completion Date (PACD). For projects that are ending but being replaced by new projects with the same purposes, outputs, and activities, combine reporting on both the old and new projects in the cover sheet and main body of the report, but report expenditures separately.

Reports should be nine to twelve pages in length with a one page summary cover sheet. Ten paper copies of the report should be submitted.

### COVER SHEET

The purpose of the cover sheet is to present readers with a quick concise picture of the progress of the project. It should be limited to one page and should contain the project name, project purpose and expected outputs, progress, and the major actions planned for the next six months.

#### Project Name:

The name of the organization and the project name.

#### Project Purpose and Expected Outputs

The purpose(s) and expected outputs noted in the project logframe should be specified. They will remain the same for all SAR reporting periods over the life of the project.

#### Project Status:

In addition to a bulletized list of major actions completed over the reporting period, this section should contain a description of project status in a brief narrative description summarizing progress toward the project purpose(s) and progress on outputs since start-up. After reading the summary, one should have a good idea of what has been accomplished since project start-up and whether progress is on schedule. It should *not* include progress on all indicators, nor should it include long descriptions of problems. If problems are major and have impeded progress to a large degree, they should be mentioned *briefly* in this section. Although progress on purpose level indicators needs to be measured and updated annually, rather than semi-annually, this section should reflect the most current measurement of progress toward the project purpose.

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**Major Actions Planned For The Next Six Months:**

This section should include a bulletized list of the key actions planned for the next six months (i.e. the next reporting period). It should not include detailed descriptions of each action planned. It should present AIO with an idea of the project direction and actions that will be undertaken during the next six months to move the project toward its purpose(s).

**Financial Status**

The following table should be completed and included on the cover page.

	<b>Amount</b>	<b>Are Expenditures Actual or Accrued?</b>
<b>Life of Project Funds</b>		<b>NA</b>
<b>Obligated To Date</b>		<b>NA</b>
<b>Expended To Date</b>		
<b>Expended During SAR Period</b>		
<b>Projected Expenditures In Next SAR Period</b>		

**MAIN REPORT**

The main body of the SAR should be nine to twelve pages. In general, it should expand on the cover sheet. It should contain narrative on results and accomplishments, initial indications of project impact, progress toward achieving purpose and output level indicator targets, gender equity, other pertinent information about project progress, expenditures, and value added taxes and custom duties recovery. The following subsections, in this order, should be included:

**Results and Accomplishments**

Discussion should focus on overall results and/or accomplishments. Discussion of project accomplishments should relate directly to the project purpose(s) and outputs, as stated in the logframe. Discussion should be divided into two sections:

- **During the SAR reporting period**

Narrative should give the reader a specific picture of accomplishments during the last six months. Also, for each component (or sub-component) include major initiatives begun, completed, and ongoing during the SAR reporting period. Provide an overall assessment of work completed during the SAR period, noting problems where (or if) appropriate.

- **Since project inception**

Narrative should give the reader a complete picture of the accomplishments of the project from start-up to the current time, for the project as a whole and for specific components. It should stand alone, and not refer to previous SARs, but, with appropriate updates and modifications, may repeat statements made in previous SARs.

### **Initial Indication of Impact**

This section should contain a general discussion about the impact(s) (whether planned or unplanned) of the project that are evident or becoming evident at this stage of the project. This section does not deal with indicators; it should report the judgment of the PVO regarding the general impact of the project.

### **Progress on Indicators**

Provide specific analysis of progress on project indicators. Discussion should follow the Indicator Monitoring Chart (format attached). See the directions that accompany the chart for specific instructions on its completion. Progress on purpose level indicators should be reported annually in the reporting period when data become available. Progress on output level indicators should be reported every six months. All indicators for which there are data should be included in the chart.

Provide analysis/discussion of key indicators and indicators which illustrate problems or significant change; not all indicators need to be mentioned in the narrative. If data are not available for indicators, the narrative should indicate why and what steps are being taken to collect the data. Discussion of indicators should focus on targets. In general, indicator discussion should represent cumulative progress on targets; progress during the SAR reporting period toward targets should be mentioned where significant deviations from the target have occurred.

If major deviations from targets occur in a reporting period, targets for the next period(s) should probably be revised accordingly. For example, if a target set at 10 for a reporting period falls short by 2, the target for the next period should be revised upward by 2 to make up for this difference. However, it may not always be possible to make up deviations in one reporting period. Major deviations from the target should be explained. Targets for the End of Project should not be changed without discussion with and approval from AID. Targets should always be realistic.

### **Gender Equity**

AID is committed to ensuring that gender equity is addressed in all funded projects. Since ongoing projects have not specifically built in gender equity components and/or outputs; ongoing reporting should try to report by gender on key indicators. Include in the following table key indicators at the purpose level if possible. If gender specific data are not

available for purpose level indicators, select key output level indicators. If gender specific data are not available for either purpose or output level indicators, beneficiary data alone should be reported. Narrative accompanying the table should indicate to what degree women are involved in project activities, and the degree to which they may be beneficiaries of the project.

Indicator	Total Number of Direct Beneficiaries	Number of Direct Female Beneficiaries	Percent of Female Beneficiaries

**Problems/Solutions**

This section should include clear statements about problems affecting the progress of the project toward its objective(s) and what steps are being taken to solve those problems. Problems and solutions should be discussed together.

**Other Pertinent Information on the Project**

This discussion should include administrative issues, comments on sustainability, institutionalization, success stories that relate directly to the project purpose, and any other relevant narrative about the project and its progress. For example, this section should list reports generated under the project, major personnel and administrative changes, consultants, visits, etc. Reports and/or papers prepared with project funding should be briefly summarized with key findings noted. Attach copies of important reports or other documents completed in the SAR period in an appendix.

**Expenditures**

This section will present the status of expenditures, budget, and pipeline for the project. It should follow the format prescribed for the Financial Tracking System (sample attached). Project financial data should be reported for the columns on the spreadsheet at the project level, by the budget categories noted on the format, and by project component.

**Value Added Taxes and Custom Duties**

Each SAR should contain a section reporting the status of Value Added Taxes (VAT) and custom duties, noting relevant observations and explanations. The report should be

-60

cumulative, life of project and not limited to the six-month reporting period. AID understands that Palestinian NGOs are not exempt from taxes and custom duties and need only report the amounts paid. The following format should be used:

Item	Amount	
	VAT	Customs Duties
Paid		
Non-collectible		
Refunds requested		
Refunded		
Outstanding		
Estimated amount outstanding more than 6 months		

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## INDICATOR MONITORING CHART

This chart will be used to report progress over the life of the project and should include all impact and output indicators. Targets should be established for each SAR reporting period in the grant proposal. Targets may have to be revised as the project progresses, but targets for all reporting periods should be filled in for each SAR. Purpose level indicators need only annual reporting; output level indicators should be reported every six months. Once the project is into the fourth reporting period, move the first SAR period data into the cumulative past column; report the second, third, and fourth SAR period data in the individual SAR period columns. When the project moves into the fifth reporting period, add data from the second period to the cumulative past column and use the individual SAR period columns to report data on the third, fourth, and fifth SAR periods.

SAR Period Dates \_\_\_\_\_; # SAR out of \_\_\_\_\_

Indicator	Baseline (beginning of project status)	Cumulative Past		SAR Period 1		SAR Period 2		SAR Period 3		Cumulative Life of Project To Date			End of Project
		Date _____		Date _____		Date _____		Date _____		Date _____		Dev. From Target	Target
		Target	Actual	Target for Period*	Actual	Target for Period*	Actual	Target for Period*	Actual	Target	Actual		
<b>Purpose Level (Impact) Indicators</b>													
<b>Output Level Indicators</b>													

\* Subsequent targets should be revised if significant deviations between targets and actual achievements occur in a reporting period. End of project targets should not be revised without discussion with and approval from AID.

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**COMPONENT SUMMARY AS OF MARCH 31, 1993**

PROJECT NAME GRANT/COOPERATIVE AGREEMENT NUMBER START AND END DATES	LOP	TOTAL THRU MARCH 31, 1993			FY92	FY 93	
		(1)	(2)	(3)	Reported Expenditures	Reported Expenditures	Planned Expenditures
		Obligated	Expended	Pipeline	4/92-9/92	10/92-3/93	4/93-9/93
Component 1	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Component 2	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Component 3	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Component 4	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
▪	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Component N	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>PROJECT TOTALS</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

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**BUDGET SUMMARY AS OF MARCH 31, 1993**

PROJECT NAME GRANT/COOPERATIVE AGREEMENT NUMBER START AND END DATES	LOP	TOTAL THRU MARCH 31, 1993			FY 92	FY 93	
		(1)	(2)	(3)	Reported Expenditures	Reported Expenditures	Planned Expenditures
		Obligated	Expended	Pipeline	4/92-9/92	10/92-3/93	4/93-9/93
<b>PROGRAM</b>							
Technical Assistance	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Training	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Special Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>SUBTOTAL PROGRAM COSTS</b>							
<b>OPERATIONS</b>							
Salaries	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Travel/Per Diem	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Overhead	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Direct Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>SUBTOTAL OPERATION COSTS</b>							
<b>PROJECT TOTALS</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

C-8

6

**APPENDIX D**

**PROJECT STRUCTURE DIAGRAMS**

65

**PVO-103/GAZA PROJECT STRUCTURE**

# reported at level

**PROGRAM STRATEGY**

PVO  
CDP

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
**Cooperative Development Project**

3

**COMPONENTS**  
Individual segments of the Project (distinct foci)

**COMPONENTS**  
Individual segments of the Project (distinct foci)

**COMPONENTS**  
Individual segments of the Project (distinct foci)

7

**SUBCOMPONENT**

**SUBCOMPONENT**

**SUBCOMPONENT**

35-50

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

9-15

**ACTIVITY SITES**  
9-15 Individual Cooperatives

D-1

106

# PVO-1, 2, 3/GAZA PROJECT STRUCTURE

#  
reported  
at level

**PROGRAM STRATEGY**

**PVO  
AMIDEAST**

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
  
Human Resource Development  
Project

8

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
Faculty Development  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of the  
Project (distinct foci)  
  
Business/University  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
Institutional Development  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
Professional Development  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

?

?

D-2

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
Small Business  
Development  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of the  
Project (distinct foci)  
  
Health Manpower  
Development  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
Basic Education  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of  
the Project (distinct foci)  
  
E.S.L.  
  
**SUBCOMPONENT**  
  
  
**ACTIVITIES**  
(Time and place specific)

350

**ACTIVITY SITES**  
  
Professionals in  
Institutions

101

PVO-1 2/ /GAZA PROJECT STRUCTURE

# reported at level

**PROGRAM STRATEGY**

PVO  
ANERA

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
Development Assistance IV

4

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Rural Agriculture  
**SUBCOMPONENT**  
Agric. Production  
Agric. Machinery  
Agric. Marketing & Processing  
Livestock & Dairy  
Irrigation  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Urban Economic Infrastructure  
**SUBCOMPONENT**  
Water/Sewage Systems  
Slaughter Houses  
Light Industry Complex  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Social & Economic Development  
**SUBCOMPONENT**  
Health Services  
Micro Enterprises  
Training  
**ACTIVITIES**  
(Time and place specific)

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Credit  
**SUBCOMPONENT**  
Loans  
Loan Guarantees  
Loan Management  
Assistance  
**ACTIVITIES**  
(Time and place specific)

D-3

176

97

**ACTIVITY SITES**  
33 Cooperatives

**ACTIVITY SITES**  
6 Municipalities

**ACTIVITY SITES**  
58 NGO's

65

PVO-1 3/GAZA PROJECT STRUCTURE

# reported at level

**PROGRAM STRATEGY**

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
**Integrated Rural Development III**

**PVO**  
**CRS-Rural Development\***

3

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
**Agriculture**

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
**Infrastructure**

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
**Small Enterprise Development**

9

**SUBCOMPONENT**  
**Credit Training**

**SUBCOMPONENT**  
**Electrification  
Roads  
Health, Sanitation  
Education Facilities**

**SUBCOMPONENT**  
**Training  
Credit  
Feasibility Studies**

?

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

?

**ACTIVITY SITES**

**ACTIVITY SITES**

D-4

109

PVO- GAZA PROJECT STRUCTURE

# reported at level

**PROGRAM STRATEGY**

PVO  
CRS-Health

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
  
Village Health Services Training Project

2

**COMPONENTS**  
Individual segments of the Project (distinct foci)

**COMPONENTS**  
Individual segments of the Project (distinct foci)

5

Training

Community Development

300

**SUBCOMPONENT**  
Curriculum Development  
Training of Health Educators  
Village Level Education

**SUBCOMPONENT**  
Organizing Village Committees  
Grant Program

90

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

**ACTIVITY SITES**  
85 Villages

**ACTIVITY SITES**  
5 Towns

D-6

10

D-1 GAZA SUBJECT SITE

# reported at level

**PROGRAM STRATEGY**

**PVO  
SCF**

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
Community Based Integrated Rural Development

3

<b>COMPONENTS</b> Individual segments of the Project (distinct foci)	<b>COMPONENTS</b> Individual segments of the Project (distinct foci)	<b>COMPONENTS</b> Individual segments of the Project (distinct foci)
Agricultural Development	Resource Conservation and Community Infrastructure	Health and Education
<b>SUBCOMPONENT</b>	<b>SUBCOMPONENT</b>	<b>SUBCOMPONENT</b>
Fencing Crop Diversification Seedling Distribution Agricultural Water Resource Development	Agriculture Roads Sewage Treatment Drinking Water Resource Development Neighborhood Sewage Line Extension Appropriate Technology Pilot Activities	Physiotherapy Training Preschool and Library Assistance
<b>ACTIVITIES</b>	<b>ACTIVITIES</b>	<b>ACTIVITIES</b>
(Time and place specific)	(Time and place specific)	(Time and place specific)

11

40-50

5-6

<b>ACTIVITY SITES</b>	<b>ACTIVITY SITES</b>	<b>ACTIVITY SITES</b>	<b>ACTIVITY SITES</b>	<b>ACTIVITY SITES</b>
Impact Area: Gaza	Impact Area: 2 Villages in Jerin District	Impact Area: 1 Village in Ramallah District	Impact Area: 2 Villages in Hebron District	Non-impact area sites

D-6

0  
reported  
at level

**PROGRESS SUMMARY**

**PC**  
**SC**

1

**PVO GRANT/PROJECT**  
Corp. Agreement with PVO  
Handicapped/At Risk Child  
Development/Hearing Impaired

3

<b>COMPONENTS</b> Individual segments of the Project (distinct task)	<b>COMPONENTS</b> Individual segments of the Project (distinct task)	<b>COMPONENTS</b> Individual segments of the Project (distinct task)
Handicapped	At Risk	Hearing Impaired
<b>SUBCOMPONENT</b> Teacher Training Child/Mother Training	<b>SUBCOMPONENT</b> Teacher Training Child/Mother Training	<b>SUBCOMPONENT</b>
<b>ACTIVITIES</b> (Time and place specific)	<b>ACTIVITIES</b> (Time and place specific)	<b>ACTIVITIES</b> (Time and place specific)

4-6

1

5,000

<b>ACTIVITY DATA</b>	<b>ACTIVITY DATA</b>	<b>ACTIVITY DATA</b>
700 handicapped children in 2 sites	4,000 at risk children at 4 sites	400 hearing impaired at 1 site

D-7

PVO- /GAZA PROJECT STRUCTURE

# reported at level

**PROGRAM STRATEGY**

PVO  
YMCA

1

**PVO GRANT/PROJECT**  
Coop. Agreement with PVO  
Vocational/Extension Service

2

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Job Enhancement

**COMPONENTS**  
Individual segments of the Project (distinct foci)  
Small Enterprise Development

10

**SUBCOMPONENT**  
Fairs  
Excursions  
Exhibitions  
Individual Placements  
Training Within Industry  
Skill Upgrading

**SUBCOMPONENT**  
Loans  
Management Training  
Equipment Rental  
Technical Advice

?

**ACTIVITIES**  
(Time and place specific)

**ACTIVITIES**  
(Time and place specific)

260

**ACTIVITY SITES**  
10 Vocational Training Centers

**ACTIVITY SITES**  
250 Vocational Graduates

D-8 -

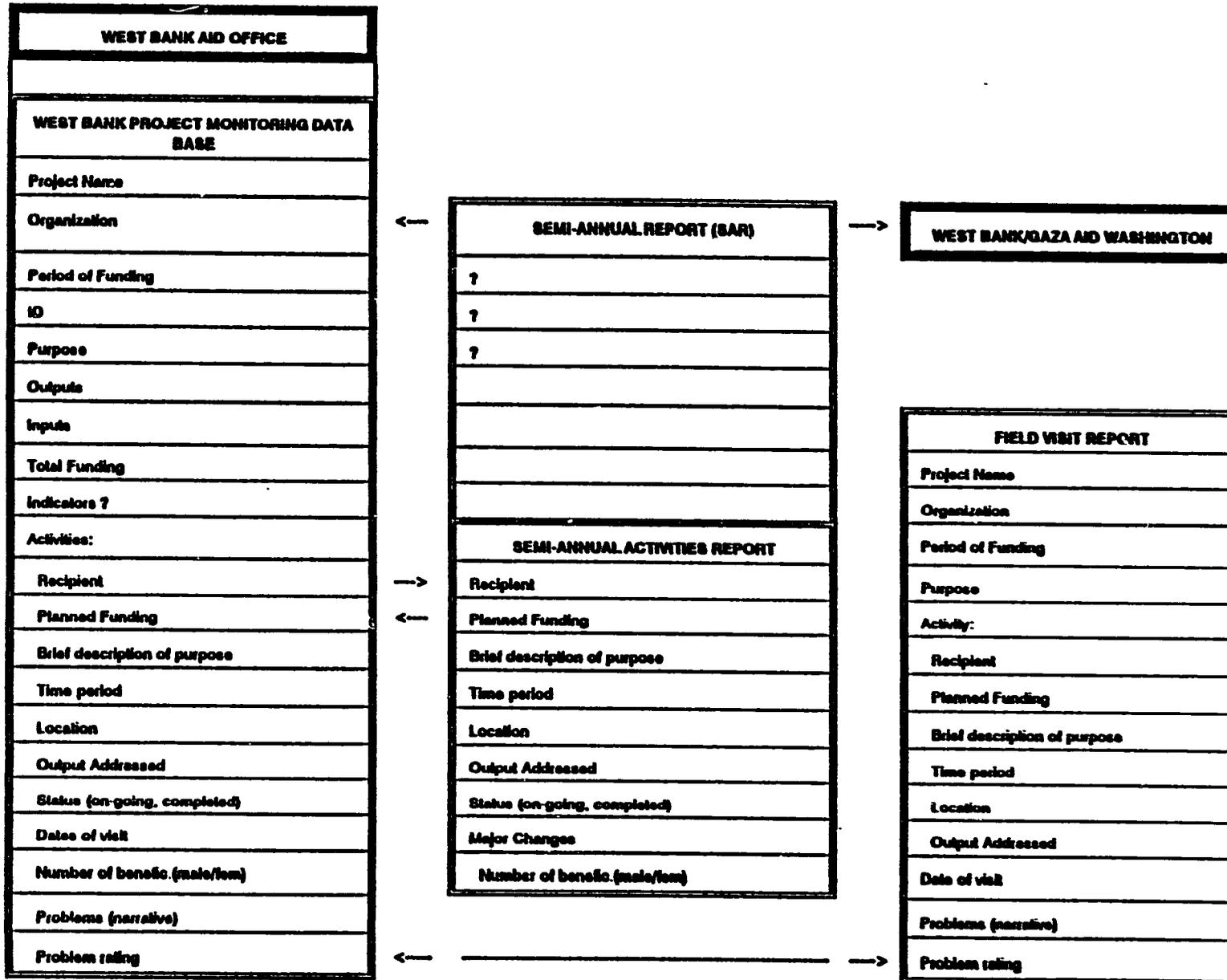
1-19

**APPENDIX E**

**FIELD MONITORING SYSTEM DESIGN**

214

# DRAFT-WEST BANK PROJECT MONITORING SYSTEM-DRAFT



E-1

1/2