



## **TAMKEEN**

**West Bank and Gaza Civil Society and  
Democracy Strengthening Project**

# **Performance Monitoring Plan: Guide for Civil Society Organizations**



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## Introduction

The Civil Society and Democracy Strengthening project (Tamkeen) developed a performance monitoring plan to measure the cumulative impact of its grants program toward the realization of results with respect to the USAID-mandated intermediate result (IR) and sub-IRs. Measuring these results is required by USAID. It is also a good way to tell USAID and others how our grants and the fine activities of our civil society organizations (CSOs) are helping to make Palestine more democratic.

CSOs receiving grants will be required to complete the Grant Vital Statistics Form, included in Section I, at the end of their grant. Section II provides a user's manual with specific directions for completing each question. Tamkeen's team of professional civil society specialists is available to help CSOs complete the form.

## **SECTION I**

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### Grant Vital Statistics Form

**Grant Number**

This form should be filled out and signed by the CSO representative as an integral part of the grant completion report. In doing so, the CSO is advised to refer to the User's Manual (Section II) for guidance. Further explanations or clarifications will be provided by the grant CSS who will supervise the proper completion of this form.

CSO Name:

CSO Number:

Name of CSO Representative:

Signature:

Date:

| <b>Part One: CSO Information</b>  |  |
|---|--|
| Name of CSO: .....  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Phone number: ____ / _____  |  |
| Fax number: ____ / _____  |  |
| Number of full-time staff:  | <input type="checkbox"/> <input type="checkbox"/>                          |
| Establishment date: ____ / ____ / ____  |  |
| Main office location (district): .....  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Email: .....  |  |
| <b>Part Two: Grant</b>  |  |
| Grant number:   | <input style="width: 100px; height: 20px;" type="text"/>                   |
| Grant starting date: ____ / ____ / ____   |  |
| Grant completion date: ____ / ____ / ____                                       |  |
| Did the grantee receive a simplified Tamkeen grant before?<br>1. Yes      2. No | <input type="checkbox"/>   |
| Is this a renewal of a previous grant?<br>1. Yes      2. No                     | <input type="checkbox"/>   |

| <b>Part Three: Sub-IR 3.1.1<br/>Increased Capacity of CSOs to Participate in Public Discourse</b>  |  |
|--|--|
| Q1. How many grant draft applications were submitted for this grant?   | <input type="text"/> <input type="text"/>                      |
| Q2. Does the grant involve any training activity?<br>1. Yes                      2. No (Skip to Q6)  | <input type="checkbox"/>                                       |
| Q3. If the answer to the above question is "Yes," was the training designed according to Tamkeen Training Best Practices (TBP)?<br>1. Yes                      2. No | <input type="checkbox"/>                                       |
| Q4. Total number of training person-hours:   | <input type="text"/> <input type="text"/> <input type="text"/> |
| Q5. Total number of trainees:  | <input type="text"/> <input type="text"/> <input type="text"/> |
| Q6. How many distinct public issues were considered under this grant in each of the following sectoral areas:  | Number:  |
| 1. Democracy and governance: elections, reform, policy analysis, local government, legislation, rule of law, civic education, human rights, women, political parties | <input type="text"/> <input type="text"/>                      |
| 2. Economy and development: private sector issues, human development, poverty  | <input type="text"/> <input type="text"/>                      |
| 3. Water and environment: water, sewage, pollution, environment, sustainable development   | <input type="text"/> <input type="text"/>                      |
| 4. Health  | <input type="text"/> <input type="text"/>                      |
| 5. Education: pre-school, school, higher education, vocational training, informal education  | <input type="text"/> <input type="text"/>                      |
| 6. Cross-sectoral issues   | <input type="text"/> <input type="text"/>                      |

| <b>Part Four:<br/>Sub-IR 3.1.2, CSOs Effectively Aggregate and Articulate Citizen Issues</b>  |   |   |  |
|---|---|---|--|
| Q7. Does the grant involve the use of mechanisms to solicit constituent opinion? (see Q8 below)<br><br>1. Yes            2. No (Skip to Q14)  |   |   | <input type="checkbox"/>   |
| Q8. If the answer to the above question is "Yes", then record below the frequency of each mechanism, the number of hours, and the number of people involved.  |   |   |  |
| Mechanisms for Soliciting<br>Constituent Opinion  | Frequency   | # of Hours  | # of People  |
| 1. Structured forums: seminars, symposia, workshops, panel discussions, interviews, focus groups  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 2. Public forums: Townhall and other similar meetings   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 3. Formal methods: polls, surveys, needs assessment exercises, impact assessment exercises  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 4. Drama: theater, story telling, film showings, etc  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 5. Others: Specify.   |   |   |  |
| a. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| b. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| c. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Q9. Did the CSO use radio to solicit constituent opinions?<br><br>1. Yes            2. No (Skip to Q14)   |   |   | <input type="checkbox"/>   |
| Q10. If the answer to the above question is "Yes," how much airtime was used (number of minutes)?   |   |   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Q11. Did the CSO use television to solicit constituent opinions?<br><br>1. Yes            2. No   |   |   | <input type="checkbox"/>   |
| Q12. If the answer to the above question is "Yes," how much airtime was used (number of minutes)?   |   |   | <input type="checkbox"/> <input type="checkbox"/>                          |
| Q13. Rate the following mechanisms with respect to their effectiveness in achieving grant objectives according to a scale from 1 (ineffective) to 3 (very effective). If a mechanism was not used, leave the field empty. |   |   |  |
| Mechanisms for Soliciting Constituent Opinions  | Rate  |   |  |
| 1. Structured forums  | <input type="checkbox"/>                          |   |  |
| 2. Public forums  | <input type="checkbox"/>                          |   |  |

|  |                          |
|--|--------------------------|
| 3. Formal methods  | <input type="checkbox"/> |
| 4. Drama   | <input type="checkbox"/> |
| 5. Radio   | <input type="checkbox"/> |
| 6. Television  | <input type="checkbox"/> |
| 7. Internet  | <input type="checkbox"/> |
| Q14. Did the grant involve advocacy activities targeting decision makers?<br>1. Yes      2. No (Skip to Q16) | <input type="checkbox"/> |
| Q15. If the answer to the above question is "Yes," what was the target group?                                |                          |
| 1. Central government officials<br>1. Yes      2. No   | <input type="checkbox"/> |
| 2. Local government officials<br>1. Yes      2. No   | <input type="checkbox"/> |
| 3. The legislature<br>1. Yes      2. No  | <input type="checkbox"/> |
| 4. Civil society leaders<br>1. Yes      2. No  | <input type="checkbox"/> |
| 5. International donors<br>1. Yes      2. No   | <input type="checkbox"/> |
| 6. Private sector leaders<br>1. Yes      2. No   | <input type="checkbox"/> |

| <b>Part Five: Sub-IR 3.1.3<br/>CSOs Effectively Disseminate Information to Citizens on Public Issues</b>  |   |   |  |
|---|---|---|--|
| Q16. Does the grant involve information dissemination activities?<br><br>1. Yes            2. No (Skip to Q23)  |   |   | <input type="checkbox"/>   |
| Q17. If the answer to the above question is "Yes," record below the frequency of each mechanism, the number of hours, and the number of people involved.              |   |   |  |
| Information Dissemination Mechanisms  | Frequency   | # of Hours  | # of People  |
| 1. Structured forums: seminars, symposia, workshops, panel discussions, interviews, focus groups  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 2. Public forums: townhall and other similar meetings   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 3. Publications: reports, books, newsletters, brochures, etc  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 4. Drama: theater, story telling, films   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 5. Others: Specify.   |   |   |  |
| a. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| b. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| c. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Q18. Did the CSO use radio to disseminate information?<br><br>1. Yes            2. No (Skip to Q20)   |   |   | <input type="checkbox"/>   |
| Q19. If the answer to the above question is "Yes," how much airtime was used (number of minutes)?   |   |   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Q20. Did the CSO use television disseminate information?<br><br>1. Yes            2. No (Skip to Q22)   |   |   | <input type="checkbox"/>   |
| Q21. If the answer to the above question is "Yes," how much airtime was used (number of minutes)?   |   |   | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| Q22. Rate the following mechanisms with respect to their effectiveness in achieving grant objectives according to a scale from 1 (ineffective) to 3 (very effective). |   |   |  |
| Information Dissemination Mechanisms  | Rate  |   |  |
| 1. Structured forums  | <input type="checkbox"/>                          |   |  |
| 2. Public forums  | <input type="checkbox"/>                          |   |  |
| 3. Publications   | <input type="checkbox"/>                          |   |  |
| 4. Drama  | <input type="checkbox"/>                          |   |  |

| 5. Radio  | <input type="checkbox"/>                          |   |  |
|---|---|---|--|
| 6. Television   | <input type="checkbox"/>                          |   |  |
| 7. Internet   | <input type="checkbox"/>                          |   |  |
| Q23. Does the grant involve the use of general constituent interaction activities?<br>1. Yes      2. No   | <input type="checkbox"/>                          |   |  |
| Q24. If the answer to the above question is "Yes," record below the frequency of each mechanism used, the number of hours, and the number of people involved. |   |   |  |
| General Constituent Interaction Activities  | Frequency   | # of Hours  | # of People  |
| 1. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 2. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 3. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 4. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 5. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 6. ....   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

## SECTION II

### Grant Vital Statistics Form: User's Manual

| <b>Part One: CSO Information</b>  |
|---|
| Name of CSO:<br><br>This is the official name, in Arabic or English, which appears in the registration documents or the CSO's formal business transactions.   |
| Phone number:<br><br>Enter one telephone number, preferably the one used most frequently.   |
| Number of full-time staff:<br><br>This is the number of full-time salaried staff on the day the grant contract was signed.  |
| Establishment date:<br><br>This is the date on which the organization had its first registration as a civil society organization regardless of the registering authority. It is not necessarily the date the CSO was registered according to the new Palestinian NGO laws.  |
| Main office location (district):<br><br>Write down the name of the district.  |
| <b>Part Three: Sub-IR 3.1.1<br/>Increased Capacity of CSO to Participate in Public Discourse</b>  |
| Q1. How many grant draft applications were submitted for this grant?<br><br>How many distinct versions of the grant application were submitted by the CSO? One should not count minor changes and editorial modifications as a "distinct" version; only versions reflecting substantive changes should be counted.  |
| Q2. Does the grant involve any training activity?<br><br>This refers to structured training activities included in the grant proposal.  |
| Q4. Total number of training person-hours:<br><br>This is calculated as follows: For each training course or activity, multiply the number of actual training contact hours by the number of registered trainees, add the results from each course, then obtain the grand total.  |
| Q5. Total number of trainees:<br><br>This is calculated as follows: For each training course, record the total number of trainees, then obtain the grand total by adding such numbers for all training courses. This allows double counting in the sense that a trainee will be counted as many times as the number of training courses he/she attended.  |
| Q6. How many distinct public issues were considered under this grant in each of the following sectoral areas.<br><br>A CSO is entitled to report consideration of a public issue if it has explicitly articulated this as one of the grant objectives. A public issue consideration is manifested through one or more of the mechanisms listed under the opinion solicitation, information dissemination, or advocacy categories. Frequently, the grant's primary focus would be on issues from one of the six categories.<br><br>If a public issue does not fall squarely under any of the five categories, it should be listed under the cross-sectoral category. |

| <b>Part Four: Sub-IR 3.1.2<br/>CSOs Effectively Aggregate and Articulate Citizen Issues</b>   |  |   |  |
|---|--|---|--|
| <p>Q7. Does the grant involve the use of mechanisms to solicit constituent opinion? (see Q8 below)</p> <p>A constituent interaction activity is identified as an “opinion solicitation mechanism” if it is explicitly articulated as such in the grant application. Consequently, during the grant application preparation and negotiation, Tamkeen coaches applicants to explicitly articulate and describe all opinion solicitation mechanisms. It is obvious that most constituent interaction mechanisms would include some “constituent opinion solicitation” components. However, such an implicit consultation or opinion solicitation would not qualify the activity to be identified in this category. In other words, the consultative content of the activity has to be dominant and included in the original design and not appear as a secondary by-product of some other activity for it to fall under this category.</p> |  |   |  |
| <p>Q8. If the answer to the above question is “Yes,” then record below the frequency of each mechanism, the number of hours, and the number of people involved.</p>   |  |   |  |
| <b>Mechanisms for Soliciting<br/>Constituent Opinion</b>  | <b>Frequency</b>   | <b># of Hours</b>   | <b># of People</b>   |
| Structured forums   | This is the total number of structured forums actually conducted (not the number proposed in the grant application). For example, if under a given grant 3 workshops, 2 panel discussions, and 1 focus group are organized, then number 6 is recorded in this box. | This is the total number of actual contact hours for all structured forums. | This is the actual total number of participants in the various reported activities. This allows double counting. |
| Public forums   | This is the actual total number of townhall and other public meetings held whose primary focus is soliciting citizens’ opinions.   | This is the total number of actual contact hours for all public forums.     | This number is necessarily an approximation and not exact.   |
| Formal methods  | This is the actual total number of polls, surveys, and needs/impact assessment exercises conducted.  | Not applicable  | This is the actual total number of people surveyed or polled.  |
| <p>Q9. Did the CSO use radio to solicit constituent opinion?</p> <p>A “Yes” answer to this question means that one radio program or more were presented and designed in a manner that seeks to solicit the opinions of listeners on a certain public issue (e.g. a call-in show).</p>   |  |   |  |
| <p>Q11. Did the CSO use television to solicit constituent opinion?</p> <p>A “Yes” answer to this question means that one or more television program(s) was presented and designed in a manner that seeks to solicit the opinions of viewers on a specific public issue.</p>   |  |   |  |
| <p>Q 13. Rate the following mechanisms with respect to their effectiveness in achieving grant objectives according to a scale from 1 (least effective) to 3 (most effective).</p> <p>A CSO is requested to present its true and honest assessment of the effectiveness of the various mechanisms. This is measured by either the scope and depth of participation, or by the impact a mechanism had on the target constituents. Obviously, such a rating will carry a discretionary judgment by the CSO, which is quite normal to such ratings.</p>   |  |   |  |
| <p>Q14. Did the grant involve advocacy activities targeting decision makers?</p> <p>This category includes all advocacy activities on public issues targeting decision makers from central government, local government, civil society, the legislature, and international donors. To be eligible for inclusion in this category, an advocacy activity has to be articulated as such in the original design of the grant. The options suggested for the advocacy target group are not mutually exclusive. That is, it is conceivable that an advocacy activity would target representatives from the business community, central government, and civil society.</p>   |  |   |  |

| <b>Part Five: Sub-IR 3.1.3<br/>CSOs Effectively Disseminate Information to Citizens on Public Issues</b>  |  |                |  |
|---|--|----------------|--|
| <p>Q16. Does the grant involve information dissemination activities?</p> <p>An activity is identified as an information dissemination activity if it is explicitly articulated as such in the grant application. Consequently, during the grant application preparation and negotiation, Tamkeen coaches applicants to explicitly articulate and describe all information dissemination mechanisms. It is obvious that most constituent interaction mechanisms would include some information dissemination components. However, such an implicit dissemination character would not qualify an activity to be listed in this category. In other words, the dissemination character of the activity has to be dominant and included in the original design and not appear as a secondary by-product of the activity.</p> |  |                |  |
| <p>Q17. If the answer to the above question is "Yes," then record below the frequency of each mechanism, the number of hours, and the number of people involved.</p>  |  |                |  |
| Information Dissemination Mechanisms  | Frequency  | # of Hours     | # of People  |
| Publications  | This is the number of different publications produced. | Not applicable | This is the actual number of publications distributed. |
| <p>Q23. Does the grant involve the use of general constituent interaction activities?</p> <p>A constituent interaction mechanism that is not identifiable as a "solicitation" mechanism or a "dissemination" mechanism is labeled "general." An example of such an activity is a play performed for young children, general educational counseling activity targeting teachers or students, or a graduation ceremony. The CSO will still be able to report the number of times the specific mechanism was used, the number of hours, and the number of people reached through each mechanism.</p>   |  |                |  |

## ANNEX A

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### Data Collection Procedures

The main components of Tamkeen's data collection procedures are: the Grant Vital Statistics Form (GVSF), the categories of public discourse, and the GVSF Manual. Following is a detailed outline of procedures for data collection and data handling:

1. The grant CSS is responsible for the timely and proper collection of grant data in line with the forms and procedures of the Performance Monitoring Plan (PMP). His/her role includes:
  - a. Introducing the GVSF and associated components as an integral part of the grant application and grant contract
  - b. Highlighting to the respective CSOs the importance of the GVSF as an effective planning, reporting, and monitoring instrument
  - c. Coaching the appropriate CSO representative in proper usage of the GVSF
  - d. Ensuring the quality of reported data through various available mechanisms, including the grant proposal and other relevant documentation
  - e. Endorsing the completed GVSFs and submitting them to the PMP database manager
2. Each CSO is expected to use the GVSF as an ongoing performance monitoring instrument. Specifically, each CSO is expected to record all relevant data for each milestone and submit it to the CSS with the request for the relevant tranche payment. Hence, a CSO will be compiling grant data on a rolling basis. Toward the end of the grant, the CSO would have compiled all grant data and reported it as an integral part of the grant completion report, using the GVSF format.
3. The grants manual will explicitly state that the milestone-based GVSF should be submitted with the tranche payment request and will become a requirement for the release of the tranche payment for that milestone. Introduction of the GVSF into the grant reporting process and enacting it as a formal prerequisite for the release of the relevant milestone will be accomplished in two phases. A transitional phase, whose length is to be decided by Tamkeen, will be used to familiarize CSOs with the new reporting system and to provide them with the necessary support to understand the process and incorporate it into their own internal project performance monitoring system. During this period, the new PMP system will be used on an experimental basis. CSOs will be coached on how to use the system, but will not become a requirement for the release of tranche payments. When the transitional period is over, Tamkeen will formally announce that the PMP reporting format has become an integral part of the grant contract and should be adhered to.

4. The grant CSS will endorse the completed GVSF and submit it to the PMP database manager, Ranan Muthaffar.
5. Ms. Muthaffar will audit all completed forms and check for consistency. In case of ambiguities, Ms. Muthaffar will ask for clarification from the relevant CSS or from Tamkeen's monitoring and evaluation officer, who will supervise the data management process.
6. Audited GVSFs will be entered using the Excel data entry platform. All data entry will be performed by the database manager.
7. The standard annual reports on PMP indicators will be produced and presented to Tamkeen senior management for review.
8. The annual report on indicators will be submitted to USAID.