

# IMPACT

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## SUMMER INSTITUTE



**EVALUATING TOGETHER:**  
Expanding Thinking  
and Strengthening Practice

**Financing  
Monitoring  
&  
Evaluation**



Funded by:





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# Outline

- Get to know each other
- M&E needed resources and financing
- How to budget M&E for a project/  
intervention
- M&E investment: Making the case with  
funders
- Q&A session

# Resources for M&E



Field data collection & analysis



Office equipment



Staff time

# Financing/ Resourcing M&E

- ✓ Institutional Policy (allocated % for M&E)
  - ❑ Mandated M&E activity
  - ❑ Assigned percentage for M&E (e.g. 9% of program allocated for M&E)
  
- ✓ Planning and budgeting M&E

# USAID Evaluation Policy (Extract)

Financial Resources: USAID will devote **approximately 3 percent** of total program dollars, on average, to **external performance and impact evaluation**. This is **distinct from resources dedicated to monitoring**. In some instances, this may require reallocation away from project implementation, particularly when the opportunity to improve effectiveness through learning is deemed to be very large. In addition, USAID acknowledges that more intensive evaluation efforts may increase the need for dedicated monitoring and data collection resources within contracts and grants to implementing partners.

# M&E Policies

- Mostly Evaluation Policy
- Benefits and limitations?

# Planning and Budgeting M&E

- At the design phase of a project/intervention
- Integrate M&E budget planning in the project/program design
- Use Monitoring and Evaluation Plan
- Develop M&E Activity Planning Table/ Section



# Monitoring Plan

Focus of Monitoring	Indicators	Data Source	Responsible	Estimated Cost
Project activities	—			
Outputs				
Outcomes				
Impact				
Assumptions	—			
Other relevant activity (e.g. change in context )				

# Example / Tool

Indicator	Source of Information	Method of Collection	Responsible	Frequency/ Time frame	Cost
<b>Outcome : 90% of targeted communities in Baluchistan Province have improved health conditions by January 2016</b>					
Number of reported affected cases is reduced	Regional health center Local health centers	Documentation review Interviews with communities Interviews with health posts	Health Program Officer	End of the Project	\$\$\$
<b>Output: at least 90% of targeted community members are vaccinated against Measles</b>					
Vaccines are available at 50 targeted health centers	Health centers inventory Nurses Communities	Inventory review Interviews FGD with communities	Field officer	end of December	\$\$\$

# Example / Tool

Example of M&E Activity Planning Table				
M&E Activity	Time/ Frequency	Responsibility	What is needed	Estimated Cost
Baseline	2 weeks in June 2016	Jo	Field data collectors – mobile phones – logistics	
End line				
Ongoing monitoring				
Mid-term Review				
End project evaluation				
Other				

Source: Adapted from IFRC, Project/Programme M&E Guide, 2011

# Example / Tool

<b>Key M&amp;E Activities</b> (Survey, Focus Group, Data Base Development, M&E Plan Development, Dissemination, Data Quality Assessment)	<b>Salaries</b>	<b>Consultant</b>	<b>Travel</b>	<b>Meetings</b>	<b>Documentation</b>	<b>Dissemination</b>	<b>Other Direct Costs e.g. computers software</b>	<b>Activity Subtotal</b>
<b>M&amp;E Activity 1</b>								
<b>M&amp;E Activity 2</b>								
<b>Total</b>								

# How to itemize ?

## Existing resources vs. Additional/Extra resources

- Staff (new or existing - salary + benefits )
- Equipment needed (e.g. mobile phones, computer)
- Travel / logistics (fuel, car, accommodation)
- Contingencies (e.g. road access)

### **2 options:**

- ✓ Separate budget line item for M&E and or
  - ✓ Embedded in other expenses (e.g. travel, staffing etc...)
- Include narrative in M&E section and for budget items

# Example

	2011	2012	2013	2014	2015	2016	2017	2018	Total
<b>Project Cost</b>									
Personnel	54,450	115,434	171,798	91,053	-	-	-	-	432,736
Travel	3,000	8,925	9,371	4,631	-	-	-	-	25,927
Sub-grants	-	50,000	80,000	80,000	-	-	-	-	210,000
Capital Equipment	50,000	20,000	30,000	-	-	-	-	-	100,000
Consulting	-	5,250	5,513	-	-	-	-	-	10,763
Other Direct Costs	250	525	551	-	-	-	-	-	1,326
<b>Direct Costs, Total</b>	<b>107,700</b>	<b>200,134</b>	<b>297,233</b>	<b>175,684</b>	-	-	-	-	<b>780,751</b>
Indirect Costs, Others	2,000	2,000	3,000	3,000					10,000
Indirect Costs, Gates Foundation	1,285	4,253	6,268	4,212	-	-	-	-	16,019
<b>Indirect Costs, Total</b>	<b>3,285</b>	<b>6,253</b>	<b>9,268</b>	<b>7,212</b>	-	-	-	-	<b>26,019</b>
<b>Total Project Cost</b>	<b>110,985</b>	<b>206,387</b>	<b>306,501</b>	<b>182,896</b>	-	-	-	-	<b>806,770</b>
<b>Funding</b>									
Others (secured, in progress, and unsecured)	60,000	140,000	150,000	70,376					420,376
Gates Foundation	51,990	99,318	146,626	88,461	-	-	-	-	386,394
<b>Total Project Funding</b>	<b>111,990</b>	<b>239,318</b>	<b>296,626</b>	<b>158,836</b>	-	-	-	-	<b>806,770</b>
Surplus / (Deficit)	1,004	32,931	(9,875)	(24,060)	-	-	-	-	-
<b>Number of FTEs</b>									
Total	1.1	2.2	3.2	1.6	-	-	-	-	

Source: <https://docs.gatesfoundation.org>

# Example

	FULL YR 1	DFID YR 1	FULL YR 2	DFID YR 2	FULL YR 3	DFID YR 3	FULL	DFID	
BUDGET (GBP)	Apr-Mar 11/12	Apr-Mar 11/12	Apr-Mar 12/13	Apr-Mar 12/13	Apr-Mar 13/14	Apr-Mar 13/14	TOTAL	TOTAL	Note No.
CAPITAL EXPENDITURE									
Sub-total									
OVERSEAS ADMIN									
Sub-total									
PROJECT ACTIVITIES									
Sub-total									
MONITORING & EVALUATION									
Sub-total									
TOTAL (OVERSEAS BUDGET)									
External Evaluation as % of Total DFID Overseas Budget (maximum 5%)									
GRAND TOTAL									

Source: Adapted from DFID Budget Template

# Example

<b>Project M&amp;E and Learning Budget</b>	<b>FY1</b>	<b>FY2</b>	<b>FY3</b>	<b>FY4</b>	<b>FY5</b>	<b>Total</b>
<b>Performance Monitoring Component</b>						
Baseline Data Collection						
Performance Data Collection & Analysis						
Data Quality Assessments						
<b>Monitoring Sub-Total</b>						
<b>Performance Evaluation Component</b>						
Performance Evaluation: Mid-Project						
Performance Evaluation: Final (End of Project)						
Impact Evaluation (may be multiyear)						
<b>Evaluation Sub-Total</b>						
<b>Learning Component</b>						
Describe Learning Activities						
<b>Learning Sub-Total</b>						
<b>TOTAL</b>						

Source: USAID Project M&E and Learning Budget Template



# Discussion


- 1- How to make the case for M&E with funders?
- 2- Topic of choice

# Summary

- ✓ Know your Organization's policy for M&E resource allocation- Usually 3%-10% of total project budget
- ✓ Ensure the M&E activities are integrated in the program activities at early stages of planning. M&E and program staff work in collaboration
- ✓ List all M&E activities- Assign responsibility for each task- determine estimated cost
- ✓ Think about all types of M&E related activities: training

# Summary – Contd.

- ✓ Include staffing needs (existing staff time and additional staffing expenses)
- ✓ Include related expenses: travel, computer, supplies, contingencies etc...
- ✓ Review donors' requirements to ensure they are included in your M&E budget planning
- ✓ Determine whether the M&E expenses are itemized separately or are captured under 1 or 2 line items. Keep your own M&E budget if necessary
- ✓ Include narrative/ descriptive section for M&E in your M&E plan or proposals



# Questions & Answers

# Thank You

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