This guidance note is part of Pillar 1 ▸ *Enabling Conditions for Good Evaluations*

▶ 1. MONITORING

Monitoring is the concurrent tracking of progress for the purpose of improving implementation strategy and results. It is an inherent part of project implementation that helps to inform the stakeholders of the progress made and the challenges faced. It gives early signals of the need for course correction and helps in taking important management decisions on time.

Essential questions to ask when setting up a monitoring system include the following:

- What is to be monitored: which results? Against what indicators?
- What data is necessary to be collected to track progress on the indicators?
- What kind of data needs to be collected: Primary, secondary (or both); qualitative, quantitative (or both)?
- Do we have appropriate baselines against which the progress will be monitored? If not, what are we doing about it?
- Have we reserved enough financial resources for collecting the data we need?
- Do we have enough human resources to collect and collate useful data?
- Do we have a system in place whereby the monitoring data could be synthesised in a manner that helps in taking decisions: dashboards, analytical periodical reports?
- Are we using the best possible and cost-efficient means for collecting credible monitoring data? For instance, have we considered using technological options that are faster, more cost efficient and less liable to manipulation?

The choices regarding collecting and using monitoring data and reports depend on availability of resources. [ILO policy guidelines for evaluation: Principles, rationale, planning and managing for evaluations](#) recommends keeping at least 3% of the project budget solely for monitoring purposes, over and above a recommended 2% for evaluations. The resource requirements for monitoring depend on the nature, magnitude and complexity of the data to be collected, as well as the level of sophistication of the monitoring system. For instance, a purely IT-based monitoring system, with analytics features, would require more financial resources to set-up, but might save human resources, over time.

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While setting up monitoring systems, the project/programme teams should carefully consider leveraging existing monitoring systems that might be collecting data on their projects. Sometimes, an evaluation can be triggered when an indicator level goes above or falls below certain thresholds. Diligent monitoring and reporting can thus help to identify special issues that need to be evaluated separately or as the primary focus of an evaluation.

Given the nature of the ILO's work, some standardised monitoring systems exist that have detailed guidance of their own. The Comprehensive Monitoring and Evaluation Plan (CMEP) used by FUNDAMENTALS; the Donors' Committee on Enterprise Development (DCED) guidance used by ENTERPRISE and the monitoring system used by Better Work are some examples.

Technical departments in the ILO are increasingly standardising their results measurement systems and it is important to contact the relevant technical department for guidance when establishing performance measurement and monitoring systems.

▶ 2. REPORTING

Reporting is a periodic, first-hand account of the project progress. A useful report is one that is based on credible and substantive inputs from the monitoring system. The periodicity of reporting depends on the nature of the data as well as on the commitment to the donor agencies. The periodicity of the report is usually stipulated in the approval minute.

The Governing Body, during its 334th session in Oct-November 2018, endorsed EVAL's recommendation to *'formalize the good practice that final progress reports incorporate self-evaluation components in lieu of a separate formal self-evaluation report'.* Following the decision, EVAL and PARDEV have together developed a version of Development Cooperation Final Progress Report (DC-FPR) template that incorporates self-evaluation components and is applicable to DC projects up to USD 500,000 maximum.

Such reports can be very useful reference documents for learning, accountability and as inputs to similar projects in future.

Very often, reporting is equated with 'donor reporting'. The latter is obligatory and obviously an important activity. However, as donor reporting formats are becoming increasingly 'templatised', they are often not able to reflect all that was done and achieved, much less the challenges faced and the strategic changes required or made.

In most instances, the evaluations find it challenging to carve out a performance story out of a plethora of periodic donor reports. For instance, a 4-year project with a quarterly reporting schedule would mean at least 12 reports, and they may still not provide the full account of the implementation experience, challenges, measures taken to address them etc.

While EVAL recognises the 'reporting burden' faced by project managers, it is also important to note that internal review and reporting, beyond the donor requirements, are useful tools, especially in longer-term, high worth projects.

They help evaluators to understand the finer points of the project implementation that are often not captured in the donor reports. They also provide a more detailed and nuanced understanding of the project implementation and help evaluators to conduct more substantive and balanced analysis.

Apart from donor report and official 'internal reports', other useful inputs to evaluations may include: the proceedings of the Project Advisory Committees (PAC); the proceedings of project reviews by stakeholders (as applicable); mission reports (organised in chronological order); aide memoirs (if applicable); justification notes for project extension (if applicable); and, any other substantive report that might be relevant to the project.

There is evidence that the ILO is starting to experiment with different reporting formats: executive summaries, photographic compilations and video montages. It might be interesting for the project teams to explore how they can use these options for improved documentation and evidence building. These can be used by evaluators to strengthen their understanding of the project and to triangulate the claimed results.

SOME USEFUL RESOURCES FOR ESTABLISHING MONITORING SYSTEMS FOR PROJECT/PROGRAMME ARE:

ILO DC Internal Governance Manual, ILO-PARDEV Chapter 6: Implementation and Monitoring
https://www.ilo.org/wcmsp5/groups/public/---dgreports/---exrel/documents/publication/wcms_452076.pdf

Resources for Developing an OCFT Comprehensive Monitoring and Evaluation Plan (CMEP), February 2018, USDOL
https://www.dol.gov/sites/default/files/images/ilab/CMEP%20Resource%20Document_FINAL%2002132018.pdf

Guide on Monitoring Decent Jobs for Youth: Monitoring, evaluation and learning in labour market programmes; NOTE 3-Establishing a monitoring system https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/instructionalmaterial/wcms_627311.pdf

The DCED Standard for Measuring Results in Private Sector Development: Control Points and Compliance Criteria, Version III, April 2017, DCED
https://www.enterprise-development.org/wp-content/uploads/DCED_Standard_VersionVIII_Apr17.pdf

Handbook: How to Design, Monitor and Evaluate Peacebuilding Results in Jobs for Peace and Resilience Programmes, Coordination Support Unit for Peace and Resilience (CSPR)/DEVINVEST, ILO 2019
https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/instructionalmaterial/wcms_712211.pdf

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