



MONITORING AND EVALUATION POLICY

HELP THE NEEDY
CHARITABLE TRUST

www.helptheneedy.org.uk

Registered Charity No: 1059951

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It is intended solely for the Help The Needy Charitable Trust.
Help The Needy Charitable Trust
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Background

Through public donations and contributions, Help The Needy Charitable Trust helped save and improve the lives of millions of people in the poorest countries around the world. By responding rapidly to emergencies Help The Needy Charitable Trust provides relief to victims of natural disasters, armed conflict and famine and through long-term development programmes such as provision of safe water, shelter, education, sustainable livelihood healthcare, Help The Needy Charitable Trust is tackling the root causes of poverty.

Having gained a wealth of experience in the field of international relief and development work, HTN focus on working in partnership with local community-based organisations. This approach has proven to be most cost-effective in relief distribution and eradication of acute poverty and is also instrumental in building the capacity of local people to help themselves, regain dignity and become empowered to lead their community more productive and self-sustained.

An evaluation of the project is required in order to assess the relevance and impact of project activities, and define how and where to focus the development programme of Help The Needy Charitable Trust so that it can reap greatest benefit.

Provides relief to victims of natural disasters, armed conflict and famine and provision of safe water, shelter, education, sustainable livelihood healthcare.

2. OVERALL AIM OF EVALUATION

The overall purpose of the evaluation is to analyze the relevance and impact of projects funded by Help The Needy Charitable Trust, and to assess the overall effectiveness of the capacity building approach to NGOs;

Specific objectives of the evaluation will be:

The evaluation will assess product, process and impact. It will identify factors that impeded impact at each level and make suggestions to address them in future projects. Through a series of case studies, part of this process will be to assess the impact of activities at beneficiary level.

To assess the overall approach, quality and efficiency of implementation

To identify and analyze current and anticipated consequences and effects of projects at field level and distill lessons learned for replication or adaptation;

To identify future directions for the project(s) to ensure the sustainability of Help The Needy Charitable Trust funding for international development projects.

3. METHODOLOGY & REPORTING

The independent evaluator (external or internal) or Evaluation Team (structure of the team is described in detail in Section 6) as recommended by Help The Needy Charitable Trust Overseas Department, in consultation with colleagues (other local NGOs or Organizations) supporting the process, will develop the evaluation methodology, which should include, at a minimum, the following:

Review of project documents

Consideration of proposed actual outcomes

Field visits, to be used to generating at least three case studies;

Use of qualitative tools to measure impact e.g. key informant interviews, Participatory Rural Appraisal (PRA) and focus group discussions;



Use of questionnaires or surveys to measure the impact of activities

- The case studies will focus on the following criteria:
- Assess what difference the project material and training/capacity building process has made for beneficiaries,
- Assess the inter-agency approach as an effective mechanism for the project and its sustainability,
- Assess any impact that the project had on elements of programmes, e.g. quality of analysis, decision-making, consultation, coordination, allocation of resources,
- Assess the impact of programmes that have used the in capacity building activities directly with beneficiaries.
- Assess the types of activities that have been developed in-country, identifying those that could be of interest for replication elsewhere.
- The evaluation report shall follow the structure given in annex 1.

4. OUTPUTS

The Consultant (Evaluation Team) would be responsible for ensuring the delivery of:

1. Three field based case studies;
2. An evaluation report of between 15 and 25 pages, plus annexes including:

1 An executive summary
(of no more than 1 page);

2 Findings and
recommendations;

3 Background
and operating
environment

5. TIMETABLE

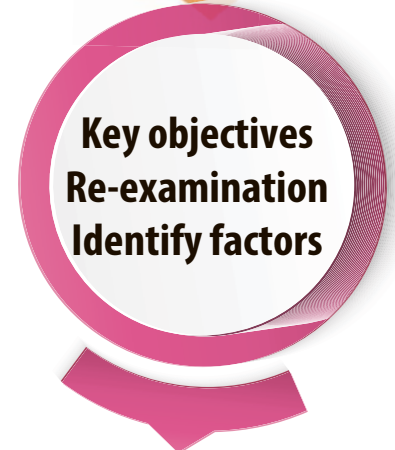
The evaluation of the project will be scheduled and communicated to the NGO and funders for the funded project.

6. EVALUATION TEAM MEMBERS

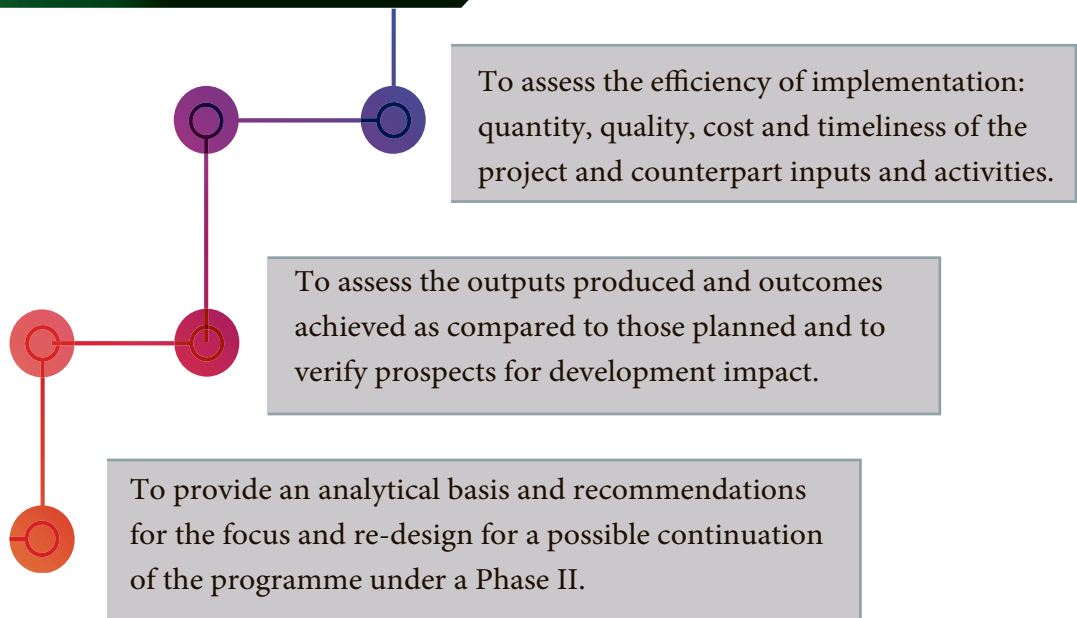
The evaluation team will be composed of an external or internal expert or combination of both. Evaluators will maintain the highest possible professional and personal standards. In particular, they will ensure the honesty and integrity of the evaluation process, and respect the security and dignity of the stakeholders with whom they interact. Information and documentation gathered in the course of an evaluation project may not be used for any other purpose without the prior permission of the Head of Help The Needy Charitable Trust Overseas Department.

Help The Needy Charitable Trust will support Independent Project Evaluation which is an activity carried out during and/or at the end of the project cycle, which attempts to determine as systematically and objectively as possible the relevance, efficiency, achievements (outputs, outcomes and impact) and sustainability of the project.

The evaluation assesses the achievements of the project against its key objectives, as set in the Project document, including re-examination of the relevance of the objectives and of the design. It will also identify factors that have facilitated or impeded the achievement of the objectives.



The purpose of the independent evaluation is to enable Help The Needy Charitable





7. Evaluation Specificities

The evaluation exercise will aim to address a wide range of issues including, but not limited to, those proposed under the following headings:

7.1

Review of Project Activities To-date

- Approach and overall philosophy of the project funded;
- Positioning and use of the project at global, regional and national levels;
- Communication at all levels;
- Scope and delivery of training (people reached, organizations involved and methods used);
- Review broader organizational training strategies and the position of the project in these;
- Review how gender and rights-based themes are incorporated in the project.

7.2

Future direction

- What should be the focus of the project in the future?
- How could strengthened ownership and sustainability of the project be established at all levels?
- How should the activities promoted through the project be replicated and multiplied in the future and materials kept relevant and up-to-date?

7.3

Project Evaluation

- The project-wide evaluation will address the following issues:

7.3.1 Relevance and Ownership

There is an agreement among the stakeholders that the objectives of the project are still valid and that the programme supports the country industrial strategy.

The programme did and continues to meet the Help The Needy Charitable Trust international targets and is related to Help The Needy Charitable Trust's corporate strategy.

The programme is complementary with relevant bilateral and multilateral cooperation and coordination programmes.

7.3.2 Funds Mobilization

The central management and counterparts were able and willing, to contribute (in kind and/or cash) to project implementation and in taking an active part in funds mobilization.

Help The Needy Charitable Trust Head Office and the Field representation paid adequate attention to and were effective in funds mobilization.

The project team and its stakeholders were in a position to participate in the process of allocation of seed money.

7.3.3 Project Coordination Management

The central management and overall field coordination mechanisms of the Project have been efficient and effective.

Help The Needy Charitable Trust Head Office based management, coordination, monitoring of its services have been efficient and effective.

7.3.4 Project Formulation

A participatory programme identification process was instrumental in selecting problem areas and counterparts requiring technical cooperation support.

The project has a clear thematically focused development objective, which will contribute to goals established by the country, the attainment of which can be determined by a set of verifiable indicators.

The project/ programme was formulated based on the logical framework approach



7.3.6

Results at the project-wide level
(contribution to industrial objectives of the country)

■ The results achieved so far at the output, outcome and whenever possible impact level.

■ If the project has or is likely to contribute indirectly to the achievement of the Millennium Development Goals/indicate which ones.

■ Result indicators were developed and facilitated the assessment of progress towards national and international development targets.

7.3.5

Synergy Benefits Derived from Project Integration

■ Coordination amongst and within components led to benefits (such as cost saving in implementing Help The Needy Charitable Trust services; increased effectiveness resulting from providing different services to the same target group; increased effectiveness resulting from interventions aiming at strengthening linkages within a system; improved effectiveness due to services provided simultaneously at the level of policies, support institutions and enterprises).

■ The transaction costs of the project (management and coordination of many stakeholders, complexity in funds mobilization, etc.) were commensurate to the benefits of integration.

Annex 1:

Template of in-depth evaluation reports of the Projects

Executive summary

- Must be self-explanatory
- Not more than one page focusing on the most important findings and recommendations
- Overview matrix showing strengths and weaknesses of the integrated participation.

Introduction

- Information on the evaluation: why, when, by whom, etc
- Information sources and availability of information
- Methodological remarks and validity of the findings

Project Summary

- Fact sheet (component/project structure, objectives, donors, counterparts, timing, cost, etc)
- Brief description including history and previous cooperation
- Context: Situation of the country; major changes in framework conditions

Funds Mobilization

- Individual components
- Project

Project Identification and Formulation

- Individual components
- Project

Implementation of Individual components/ Projects

- Relevance, ownership, reaching target groups, sustainability, management, outputs, outcome, impact (by component or project, as appropriate)
- Overview table showing performances by components

Implementation of the Project

- Internal and external coordination, synergy effects
- Identity, degree of integration, visibility
- Policy relevance, ownership, reaching target groups, sustainability
- Overview matrix showing strengths and weaknesses of the project implementation
- Issues with regard to next phase II (if applicable)



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