



## **Monitoring and Evaluation Policy**

**August 2023**

## Document Profile

<b>Type</b> (i.e. Policy, Strategy, Procedure, Guideline, protocol)	Policy
<b>Title</b>	Monitoring and Evaluation Policy
<b>Version</b>	Third version
<b>Author</b>	Harriet Hall
<b>Approval Route</b>	Jersey Overseas Aid Commission
<b>Approved by</b>	Simon Boas
<b>Date approved</b>	August 2023
<b>Review date</b>	December 2024
<b>Linked polices</b>	JOA's Safeguarding Policy JOA's Anti-Fraud, Corruption and Theft Policy

Version No.	Sources
2	In developing this Monitoring and Evaluation Policy, JOA consulted an array of existing resources, including (i) the M&E policies of the IUCN, UNITAR, the Millennium Challenge Corporation, (ii) the TORs for evaluations of Practical Action, ILO, and UNDP, (iii) the evaluation guidelines of SCIAF, and (iv) the M&E guidelines and definitions of UNICEF, UK Aid Match, ILO and the OECD.

## Contents

<b>1</b>	<b>Introduction .....</b>	<b>5</b>
1.1	Rationale.....	5
1.2	Aims and Objectives.....	5
1.3	Scope.....	5
1.4	Principles .....	5
<b>2</b>	<b>Purpose of monitoring, evaluation, and learning .....</b>	<b>6</b>
2.1	Organisational Learning & Knowledge Sharing.....	6
2.2	Project Oversight.....	6
2.3	Accountability.....	6
<b>3</b>	<b>Roles and Responsibilities.....</b>	<b>6</b>
3.1	JOA partners .....	6
3.2	JOA staff.....	6
3.3	JOA-conducted field monitoring and evaluation .....	7
	JOA-conducted field monitoring visit is not intended to replace other internal or independent forms of project monitoring. ....	7
3.4	Other parties .....	7
<b>4</b>	<b>Scope of monitoring and evaluation activities .....</b>	<b>7</b>
4.1	International Development Projects (over £450,000 JOA grant) .....	8
4.2	International Development Projects (under £450,000 JOA grant) .....	8
4.3	Humanitarian Projects .....	8
4.4	Jersey Charity Projects (£100,000 - £450,000 JOA grant) .....	8
4.5	Jersey Charity Projects (under £100,000 JOA grant) .....	9
<b>5</b>	<b>Definitions and criteria .....</b>	<b>9</b>
5.1	Monitoring.....	9
5.2	Evaluation.....	9
5.3	Evaluation Criteria.....	9
5.4	Attributability.....	9
<b>6</b>	<b>Confidentiality.....</b>	<b>10</b>
	<b>Appendix 1: Procedure for JOA-conducted Field Monitoring Visits .....</b>	<b>11</b>
	Purpose.....	11
	Approach .....	11
	Methodology .....	12
	Areas of Focus .....	14

Post-visit Procedures.....	16
<b>Appendix 2: JOA-conducted Monitoring Visit TEMPLATE Terms of Reference .....</b>	<b>17</b>
Background.....	17
Objectives .....	17
Areas to be Reviewed .....	17
Methodology .....	17
Documentation.....	18
Responsibilities.....	18
Financing of Monitoring Visit.....	19
Work Plan .....	20
<b>Appendix 3 - JOA-conducted Monitoring Visit TEMPLATE Executive Summary .....</b>	<b>21</b>
<b>Appendix 4 JOA-conducted Monitoring Visit TEMPLATE Monitoring Report.....</b>	<b>22</b>
<b>Appendix 5 JOA Partner Feedback Matrix .....</b>	<b>25</b>
Partner Response .....	25
<b>Appendix 6 Guidelines for JOA-funded Independent Evaluations.....</b>	<b>26</b>
Purpose.....	26
Commissioning of Independent Evaluations.....	26
Products.....	26

## 1 Introduction

### 1.1 Rationale

Jersey Overseas Aid (JOA) was established in 1968 and is the Bailiwick of Jersey's official, taxpayer-funded international aid and development donor. JOA is responsible for overseeing the delivery of humanitarian aid and international development assistance on behalf of the people of Jersey, striving to meet the highest standards of aid effectiveness and good donorship.

High-quality monitoring, evaluation and learning processes underpin JOA's ability to serve both the world's poorest people and Jersey's own citizens, an obligation discharged by selecting the most effective projects, managing them to the highest standard, and sharing and utilising the knowledge they generate.

### 1.2 Aims and Objectives

This policy sets out JOA's approach to monitoring, evaluation, and learning. Specifically, it aims to:

- Demonstrate JOA's commitment to monitoring and evaluating its work, using the results to improve programming and direct strategy for greater impact.
- Outline key principles, roles and responsibilities in relation to project oversight, monitoring, evaluation, and the consolidation and communication of learning.
- Set out relevant procedures for undertaking MEAL responsibilities.

### 1.3 Scope

All JOA staff must comply with this policy. However, this policy is also aimed at external stakeholders, such as partners and sub-grantees, to provide information on JOA's standards and procedures.

This policy applies to (i) International Development projects, (ii) Humanitarian projects and (iii) Jersey charities' projects.

### 1.4 Principles

This policy is guided by the following specific principles:

- **Do No Harm:** JOA is obligated to prevent and mitigate any potential negative effects of its MEAL activities. This includes ensuring the safety of contributors, upholding confidentiality where requested, and collaborating with JOA partners to ensure that JOA projects uphold the Do No Harm principle.
- **Gender Equality:** JOA will ensure explicit consideration of gender in all project monitoring, evaluation, and learning. Where possible and appropriate, data should be disaggregated by sex and disability.
- **Inclusion of PWDs and minority groups:** Where relevant to the project objectives, JOA will ensure the explicit assessment of the inclusion of PWDs and minority groups in all project monitoring, evaluation, and learning.

- **Capacity-building:** JOA will support the capacity-building of organisations with regard to project monitoring, evaluation, and knowledge sharing activities.
- **Local Ownership:** JOA is committed to upholding local ownership of its projects by encouraging participatory monitoring, feedback, and evaluation.
- **Transparency:** JOA will monitor each project and report transparently to guarantee accountability to both Jersey taxpayers and project participants.

## 2 Purpose of monitoring, evaluation, and learning

### 2.1 Organisational Learning & Knowledge Sharing

Monitoring and evaluation activities generate learning about the intended and unintended effect of activities, the effectiveness of particular approaches and the impact of JOA's work overall. As a result, monitoring and evaluation is key to driving organisational learning and enhancing JOA's ability to share knowledge, especially in relation to its geographic and thematic priorities.

### 2.2 Project Oversight

The ongoing monitoring and evaluation of JOA-funded projects informs project management decision-making, particularly with regard to risk, performance management and in the event of proposed revisions to project budget, activities or duration.

### 2.3 Accountability

JOA is a government-funded organisation that is accountable to the Government of Jersey, its taxpayers, and its project participants. JOA needs to demonstrate that resources are being used efficiently and effectively, and that proper procedures are being followed by partners and implementing organisations. Relevant and appropriate monitoring and evaluation enhances confidence in the quality of Jersey's overseas aid.

## 3 Roles and Responsibilities

### 3.1 JOA partners

JOA's partners are primarily responsible for ensuring the timely monitoring and evaluation of JOA-funded projects and programmes. JOA partners are responsible for reporting to JOA on project or programme progress in accordance with the terms of the relevant grant agreement. Minimum standards of M&E for different projects are set out below.

### 3.2 JOA staff

JOA staff – in particular JOA programme staff – are responsible for the day-to-day oversight of JOA-funded projects and programmes. JOA's monitoring and impact staff are responsible for providing specific MEAL-related guidance and oversight, including:

- Conducting monitoring and evaluation assessments of funded projects (see section below)

- Collaborating with JOA partners to finalise and, where required, revise project and programme indicators.
- Providing guidance in relation to the tender process for independent evaluations.
- Providing ongoing support to JOA partners with regard to MEAL activities and amends to M&E-related project documents.

### **3.3 JOA-conducted field monitoring and evaluation**

JOA staff will routinely conduct monitoring missions in order to assess the ongoing success of a project in accordance with the objectives set out above and the procedures set out in Appendix 1.

In general, JOA will aim to conduct field monitoring visits approximately mid-way through a project or programme, ideally in advance of, or simultaneously with, any mid-term project evaluation to allow for JOA recommendations to contribute toward post-evaluation course-correction. In instances where a mid-term project evaluation is also to be carried out by the grantee or an independent consultant, JOA's field monitoring may be timed to take advantage of logistical and other synergies. Occasionally JOA may also conduct post-project evaluations.

JOA-conducted field monitoring visit is not intended to replace other internal or independent forms of project monitoring.

### **3.4 Other parties**

From time to time, JOA or JOA partners may commission third parties to undertake monitoring and / or evaluation activities, such as independent evaluations. In these instances, such third parties will be responsible for specific activities, as set out in the relevant TOR.

## **4 Scope of monitoring and evaluation activities**

JOA is committed to monitoring and evaluation procedures that are proportionate and appropriate to the type of project or programme that is being implemented. High-value, multi-year development projects – which have clear and measurable objectives – are subject to the highest level of JOA-conducted monitoring and evaluation. Meanwhile, for humanitarian projects – where projects are usually shorter, funding much less restricted, and JOA is often contributing to a much larger response – a much lighter-touch and less onerous level of monitoring and evaluation is appropriate.

In the event that a project or programme is deemed by JOA to be particularly (i) innovative, (ii) strategically significant, or (iii) in need of additional oversight or attention, further monitoring and evaluation activities may be required. From time to time, JOA may also commission meta-evaluations or impact assessments in order to assess the quality of the MEAL process, determine the effectiveness of its work, and inform its strategic direction.

#### **4.1 International Development Projects (over £450,000 JOA grant)**

For international development projects – whether conducted by Jersey or international organisations – where the JOA grant is £450,000 or greater, the following monitoring and evaluation activities are anticipated, unless otherwise agreed:

- A baseline assessment
- Routine monitoring in accordance with the approved M&E plan, as finalised with JOA during inception
- Routine reporting to JOA, against the approved Results Matrix, in accordance with the grant agreement
- Routine reporting to JOA, against the approved JOA Standard Indicators Results Matrix.
- A mid-term evaluation
- One or more JOA-conducted field monitoring visits
- A final independent evaluation

#### **4.2 International Development Projects (under £450,000 JOA grant)**

For international development projects – whether conducted by Jersey or international organisations – where the JOA grant is less than £450,000, the following monitoring and evaluation activities are anticipated, unless otherwise agreed:

- A baseline assessment
- Routine monitoring in accordance with the approved M&E plan
- Routine reporting to JOA, against the approved Results Matrix, in accordance with the grant agreement
- Routine reporting to JOA, against the approved JOA Standard Indicators Results Matrix.
- A final internal evaluation, unless otherwise agreed

#### **4.3 Humanitarian Projects**

For Humanitarian projects, the following monitoring and evaluation activities are anticipated, unless otherwise agreed:

- Routine reporting to JOA, in accordance with the grant agreement

#### **4.4 Jersey Charity Projects (£100,000 - £450,000 JOA grant)**

JOA is committed to supporting Jersey Charities in developing their projects including, where requested, co-creating monitoring and evaluation documents. For Jersey Charity projects where the JOA grant is £100,000 or greater but less than £450,000, the following monitoring and evaluation activities are anticipated, unless otherwise agreed:

- A baseline assessment
- Routine monitoring in accordance with the approved M&E plan
- Routine reporting to JOA, against the approved Results Matrix, in accordance with the grant agreement
- A final internal evaluation or a JOA-conducted evaluation, as agreed



#### 4.5 Jersey Charity Projects (under £100,000 JOA grant)

JOA is committed to supporting Jersey Charities in developing their projects including, where requested, co-creating monitoring and evaluation documents. For Jersey Charity projects where the JOA grant is less than £100,000, the following monitoring and evaluation activities are anticipated, unless otherwise agreed:

- Routine monitoring in accordance with the approved M&E plan
- Routine reporting to JOA, against the approved Results Matrix, in accordance with the grant agreement

## 5 Definitions and criteria

### 5.1 Monitoring

Monitoring is the regular process of collecting and analysing information during the implementation of a project in order to determine progress of activities and achievement of milestones objectives. Monitoring can happen at several levels and be conducted by a variety of parties, including implementing organisations, JOA partners and JOA in relation to specific projects and wider programmes.

### 5.2 Evaluation

Evaluation is the systematic assessment of a project or programme. Evaluations should provide credible, reliable, and useful information, enabling timely incorporation of findings, recommendations and lessons learnt in relation to JOA-funded projects or programmes in order to enhance the overall quality of JOA – and JOA’s partner’s – programming and strategic direction.

### 5.3 Evaluation Criteria

JOA is committed to ensuring that all evaluations adhere to international standards and best practice. In particular, JOA adopts the six widely-recognised criteria for evaluation that have been recommended by the OECD Development Assistance Committee:

- **Relevance:** is the intervention doing the right thing?
- **Effectiveness:** is the intervention achieving its objectives?
- **Efficiency:** how well are resources being used?
- **Coherence:** how well does the intervention fit?
- **Impact:** what difference does the intervention make?
- **Sustainability:** will the benefits last?

### 5.4 Attributability

In assessing progress of a project or programme, the degree to which progress – or lack of it – can be specifically attributed to JOA and its partners may not be always clear, particularly where a range of actors may be contributing toward change in a particular area, or for a particular target group.

Notwithstanding the complexities involved, JOA is committed to ensuring that all evaluations assess both the extent to which JOA's work has contributed toward change and the extent to which any change is directly attributable to JOA.

## **6 Confidentiality**

JOA will hold all confidential information in trust and strict confidence and agree that it shall be used only for the purpose of assessing the ongoing progress of JOA-funded projects and programmes. No confidential information will be shared with any party outside of JOA, save for the relevant organisation(s) and as required by law, in accordance with Jersey's data protection law.

All personal data collected in the course of JOA-conducted M&E will be relevant and adequate, proportionate to its purpose. Confidential information relating to any project participants will be held and managed by JOA in accordance with good practice.

## Appendix 1: Procedure for JOA-conducted Field Monitoring Visits

### Purpose

The purpose of a JOA-conducted field monitoring visit is to:

- Review project outputs and the outcomes of activities in-situ, to better understand (i) the extent to which they have taken place, and (ii) the consequences of the project so far.
- Ensure that proper procedures are being followed by implementing organisations.
- Develop a closer, learning-based relationship with implementing and co-ordinating organisations and project participants.
- Collect content, such as images, for communications purposes.
- Maintain project-related skills and expertise of JOA staff and Commissioners.

### Approach

JOA is committed to ensuring that JOA-conducted field monitoring visits (i) align with best practice, (ii) are complementary the work of our partners, and (iii) are constructive in supporting projects to meet their objectives.

### Planning and Logistics

JOA will consult with partner organisations to determine the timing and scope of any field monitoring trip. Save for in the event of unforeseen circumstances, at least two months notice of intention to conduct a field monitoring visit will be communicated to the relevant partner.

### Risk Assessment

In advance of each field monitoring visit, the responsible JOA staff member is required to complete a Project Visit Risk Assessment Form. In addition, it is advised that JOA engage with project staff when considering potential risks associated with JOA staff interaction with project participants and members of the community, in accordance with the 'Do No Harm' principle.

### Duration

Where possible, project monitoring visits will be 3 – 5 days long, allowing for at least one day in the office and 2 – 4 days engaging with project staff and project participants and visiting project sites. This is to ensure that there is sufficient time for a comprehensive review of the project, whilst ensuring that the visit does not impact the continuation of project activities.

### Translation Support

Where possible, JOA partners will be asked to ensure that a project team member, unaffiliated with the community, is available to provide translation during focus group discussions and key interviews. In the event that it is determined that a person known to – and trusted by – the community is more appropriate, JOA staff will request that

arrangements be made to ensure that such persons are available to provide assistance with translation.

### **Safeguarding Commitment**

JOA is committed to ensuring the wellbeing of all project participants. In light of this, JOA members of staff will ensure that during a JOA-conducted field monitoring visit they will at no times be alone with any project participant and will engage with JOA partners and implementing organisations to ensure that the JOA-conducted field monitoring visit aligns with good safeguarding practices and the principles outlined in JOA's MEAL Policy.

### **Financial Commitment**

JOA is committed to ensuring that all expenses incurred by partners in relation to JOA-conducted field monitoring visits are the responsibility of JOA. These costs may include:

- Travel costs for JOA partners and relevant organisations
- Vehicle, fuel and driver-related costs
- Per diems and logistics costs for meetings and focus group discussions
- Accommodation costs and meal expenses for the relevant project staff
- Translation
- Costs incurred on behalf of JOA staff members, such as visa costs, accommodation, and meals expenses

JOA partners are encouraged to anticipate staff costs required to facilitate one JOA-conducted monitoring visit when developing their project MEAL plan and subsequent project budget.

### **Communications Activities**

When conducting field monitoring visits, there may be opportunities to collect Comms material. JOA staff are reminded that images and video that feature identifiable individuals must be taken in accordance with Jersey's data protection legislation and accompanied by signed consent forms.

### **Methodology**

JOA understands the value of ensuring that field monitoring trips are targeted and comprehensive. In order to achieve this, JOA-conducted field monitoring trips will adopt a mixture of methodologies that are appropriate to the purpose of the field monitoring visit.

The specific methodology for each field monitoring visit will be outlined in advance in the Terms of Reference plan and will consist of the following components, unless otherwise determined.

### **Team Discussions**

In order to introduce the purpose of the field monitoring visit, appropriate persons representing JOA's partner and relevant implementing organisations will be engaged in a group session at the beginning of the monitoring visit.

Where possible, a subsequent final team discussion will also be arranged, to provide feedback and discuss any proposed next steps.

### **Document Review**

JOA will review of project documents, which may include expenditure receipts, petty cash books, procurement documents, minutes of key coordination meetings, and attendance registers. JOA partners will usually be informed in advance of any documentation that needs to be available during the field trip, as well as any particular staff or stakeholders JOA will wish to speak with.

### **Key personnel consultations**

In order to better understand the progress of a project, meetings will be conducted with key staff of the grantee and other partner implementing organisations. As far as possible a list of key personnel to be interviewed will be provided in advance.

### **Other stakeholder interviews**

Interviews will be conducted with other relevant stakeholders, which may include government officials, staff from other NGOs and UN Agencies, private sector actors and project partners. Co-ordination and interviewee selection will take place in collaboration with JOA's partner.

### **Focus Group Discussions**

During the field monitoring visit, JOA staff will engage with partners to conduct focus group discussions with project partners. Co-ordination and participant selection will take place in collaboration with JOA's partner, with the intention of ensuring that the discussions are both constructive and representative.

JOA acknowledges that, depending on the context, the presence of outsiders unknown to the community might influence the responses of any project participants. Where possible, JOA will request that focus group discussions take place without the presence of persons directly involved in the oversight or implementation of the project, unless it is otherwise deemed appropriate. JOA will engage with JOA partners to understand appropriate approaches for each focus group discussion and will seek to facilitate discussions, where suitable, as sensitively as possible.

### **Site Visits**

Visits to project sites, including any sites of infrastructure, training, and community events, are an essential component to any field monitoring visit and enable JOA staff to observe and experience the impact of the project. Where a project involves multiple project sites, JOA will engage in a process of selection that aims to ensure that a representative range of sites are visited. This may involve JOA's partner categorising

project sites as ‘highly successful’, ‘successful’ and ‘experiencing challenges’ and ensuring that project sites from each category are incorporated into the monitoring visit schedule.

## **Areas of Focus**

JOA-conducted field monitoring trips involve the review and assessment of seven specific areas of focus.

### **Project Management**

Good management is key to ensuring the successful implementation of a project. In particular, JOA staff will consider the following questions with regard to the management of the project:

- Are there written agreements for all partnerships and are their terms widely understood?
- Are the deliverables understood by all key personnel and partners?
- Are the conditions of the JOA grant well understood by senior project staff and has the log frame been understood by all relevant persons?
- How is the relationship between the internationally based staff of JOA’s partner and the country office and / or the relationship between the partner’s country office and implementing organisations? Are there any challenges in communication or variances in expectations?
- To what extent does there appear to be appropriate management, support and capacity-building in for country offices and implementing partners?
- What policies and procedures – especially relating to safeguarding – exist and to what extent are they communicated, understood, recorded, and operational?
- Are project staff appropriately trained? Is there a staff or HR handbook and how well is it understood?
- Are there any ongoing organisational vacancies and have there been any recent issues with recruitment?

### **Financial Management and Procurement**

In order to ensure probity and value for money, JOA staff will endeavour to determine whether appropriate measures and internal controls are in place with regard to:

- Procurement
- Contracting
- Partner assessment and management
- Cash management
- Reconciliations
- Auditing
- Record-keeping
- Recording, investigation and handling of incidents

- Oversight from International Office

### **Activities**

In order to assess the progress of a project, JOA staff will consider the following questions:

- Are the project activities appropriately budgeted and planned?
- Is 'Hardware' in place as described and of the required quality?
- Does it appear that the implementation of such 'Hardware' has had the intended effect?
- Is there evidence that resources have been distributed fairly and efficiently?
- Have 'Software' activities, such as training, taken place as expected?
- Does it appear as though such 'Software' activities have had the intended effect?
- Do activities adhere to protocol and are any ongoing requirements for the sustainability of project activities appropriate and operational?
- Is there appropriate project participant involvement in activities and an understanding of the purpose of such activities?
- Do there appear to have been any unintended outcomes of the project?

### **Coordination, Ownership and Alignment**

To examine the coherence and relevance of the project, and the extent to which it includes and empowers local people, JOA staff will attempt to develop an understanding of the priorities of target groups and other local (or national). In particular, JOA staff will consider:

- Project participants' perspectives of the approach and effectiveness of the project, and how these are incorporated into project design and implementation
- To what extent there is coordination with the National and District authorities and their priorities
- To what extent there is coordination with other organisations and how the project complements other related initiatives

### **Partner M&E**

When conducting a field monitoring visit, JOA staff will review project M&E practices, including:

- The use of management information systems
- Awareness of, and adherence to, the project M&E plan
- The methodology and results of baseline assessments and mid-term evaluations
- The extent to which the M&E activities assess additionality
- Feedback loops and course correction

### **Visibility**

Adherence to JOA visibility guidelines will be assessed during the course of a field monitoring visit, with key questions including:

- How is Jersey's role being communicated to project participants, staff and other stakeholders
- To what extent are guidelines being adhered to in project materials

### **Donorship**

A key aim of JOA's monitoring visits is to improve the quality of its own donorship. Key questions to consider include:

- To what extent is JOA, as an organisation, a supportive donor?
- Are JOA's systems and practices appropriate and easy to understand?
- Are there areas where JOA could improve its operations in a way that enhances its programming?
- Are there any ways JOA could improve its strategic focus that might improve the impact of JOA's work?

### **Post-visit Procedures**

#### **Write-up**

Following the visit, the responsible member of JOA staff will complete the Monitoring Visit Monitoring Report Template and the Monitoring Visit Executive Summary Template. These provide the framework for JOA staff to record key points such as the visit's objectives, methods of review and any observations. It also ensures that any concerns are detailed. All write-ups are to be filed, internally.

#### **Presentation**

In general, all field monitoring visits will be summarised, and the findings will be presented to JOA staff and Commissioners to support the maintenance of project-related skills and expertise.

#### **Feedback**

In addition to any feedback provided in the group session at the end of the field monitoring visit, following the visit the responsible JOA staff member will provide feedback to the relevant JOA partner including, where relevant, implementing partners. Where possible, feedback will be provided within eight weeks of the visit. Partners will be invited to review the draft Monitoring Report and Executive Summary, and complete the Partner Feedback Matrix which will be Annexed to both documents – feedback must be shared with JOA within 4 weeks.

#### **Further Action**

In the event that the field monitoring visit raises concerns, the responsible member of JOA staff will initiate appropriate further action in accordance with relevant policies (e.g. Safeguarding, Fraud).



## Appendix 2: JOA-conducted Monitoring Visit TEMPLATE Terms of Reference

[Project Title]: [Partner Organisation]

### Background

High-quality monitoring, evaluation, and learning processes underpin JOA's ability to serve both the world's poorest people and Jersey's own citizens, an obligation discharged by selecting the most effective projects, managing them to the highest standard, and sharing and utilising the knowledge they generate.

### Objectives

The purpose of this JOA-conducted monitoring visit is to:

- Review project outputs and the outcomes of activities in-situ, to better understand (i) the extent to which they have taken place, and (ii) the consequences of the project so far.
- Ensure that proper procedures are being followed by implementing organisations.
- Develop a closer, learning-based relationship with implementing and co-ordinating organisations and participants.
- Collect content, such as images, for communications purposes.

### Areas to be Reviewed

In the course of the monitoring visit, the following areas will be reviewed:

- [Insert area of review], including:
  - [Insert specifics]
  - [Insert specifics]
- [Insert area of review], including:
  - [Insert specifics]
  - [Insert specifics]
- [Insert area of review], including:
  - [Insert specifics]
  - [Insert specifics]

### Methodology

The visit will engage with a mixture of methodologies, in particular:

- [Partner office location]: (i) Group discussions with project staff and (ii) document review including:
  - An update on project activities
  - Discussion of monitoring and reporting activities
  - Discussion of policies and procedures
  - Review and discussion of financial processes
  - Review and discussion of procurement processes
- [Project site]: (i) individual discussions with project staff, (ii) focus group discussions, (iii) interviews with key stakeholders, and (iv) observation

It is proposed that [partner organisation] and JOA collectively pre-select individuals and groups to be engaged with during the course of the monitoring visit.

## **Documentation**

### **Documents to be provided in advance**

- Baseline Survey
- Mid-term Evaluation
- Results Matrix (with latest results)
- Latest organogram of [partner organisation] office
- Safeguarding policies of [partner organisation] and project partners
- Fraud & Corruption policies of [partner organisation] and project partners
- Procurement policies of [partner organisation] and project partners
- Staff handbook of [partner organisation] and project partners (if applicable)
- [other documents might include recent research / publications relating to the project, minutes of key meetings etc.]

### **Documents to be available during visit**

- All other organisation policies and procedures
- Project-related partnership agreements
- Financial records relating to the project, including but not limited to tender documents, receipts, and cashbooks
- Reports relating to the project, including but not limited incident reports, progress reports, and commissioned reports (where relevant)
- Project registers, including but not limited to any project participant registers, workshop registers, and training registers
- Training materials provided during training and / or workshops

## **Responsibilities**

### **Transport**

[This is subject to discussion with [partner organisation] but would be JOA's preferred approach (due to a range of challenges relating to accessing and carrying funds, etc.)]

JOA will be responsible for travel from [insert details] airport to JOA accommodation in [insert city].

[Partner organisation] will be responsible for travel, including arranging the hotel pick-up of JOA staff in order to visit [Partner organisation] office, organising transport to the project region, and organising a vehicle and driver for JOA staff for the project site visit. The vehicle must meet [insert project country] health and safety requirements, be suitable for the expected terrain, and have functioning seatbelts.

### **[City] Accommodation**

JOA will be responsible for organising accommodation in [insert city].

### **Project Site Accommodation**

[Partner organisation] will be responsible for organising accommodation during the field visit.

### **Daily Expenses**

[Partner organisation] will be responsible for meeting the daily expenses (such as meals, petrol and tolls) incurred by JOA staff during the visit (outside of [insert city]).

### **Co-ordination of Meetings**

[Partner organisation] will be responsible for co-ordinating all meetings and discussions, as agreed between JOA and [Partner organisation], including arrangements relating to premises, per diem, and refreshments for participants.

### **Translation**

[Partner organisation] will provide an appropriate member of staff to provide translation or, where this is not possible, arrange for a translator to be present.

### **Interviews & Recording**

JOA's Monitoring & Impact Officer will be responsible for conducting interviews and leading group discussions during the monitoring visit.

JOA's Monitoring & Impact Officer will also be responsible for recording interviews and group discussions, both in audio (where consent has been given) and through notetaking.

### **Feedback**

JOA will be responsible for ensuring that there is appropriate discussion of the monitoring visit and opportunity for feedback between [Partner organisation] and JOA. This will take place both within the "wash up" meeting at the end of the visit, and through the Partner Feedback Matrix (Appendix 5) shared with the draft Monitoring Report and Executive Summary.

### **Financing of Monitoring Visit**

The purpose of this monitoring visit is to engage with in-country staff, communities, and other stakeholders directly. It is not JOA's intention that international staff attend these monitoring visits and JOA will not re-imburse any expense incurred in relation to international staff in the event that they are present.

JOA will re-imburse [Partner organisation] for all additional expenses incurred by the in-country team in relation to the monitoring visit, subject to being provided with an itemised statement. Additional expenses include:

- Travel costs for JOA partners and relevant organisations
- Vehicle, fuel and driver-related costs
- Per diems and logistics costs for meetings and focus group discussions
- Accommodation costs and meal expenses for the relevant project staff
- Translation

- Costs incurred on behalf of JOA staff members, such as visa costs, accommodation, and meals expenses

**Work Plan**

[Preliminary Example]

Activity	[Date]													
	W	T	F	S	S	M	T	W	T	F	S	S	M	
Travel Jersey – [Country]														
Office Review														
Consolidate Notes														
Travel to Project Site														
Review of Local Partners														
Monitoring activities at Project Site														
'Wash-up' with staff and partners														
Travel to Capital														
Travel [Country] – Jersey														

## Appendix 3 - JOA-conducted Monitoring Visit TEMPLATE Executive Summary

### Project Summary

<b>Project Title</b>	
<b>Organisation</b>	
<b>Partner(s)</b>	
<b>Country</b>	
<b>Total Project Budget</b>	
<b>JOA Grant</b>	
<b>Overall Objective</b>	
<b>Outcomes</b>	
<b>Start Date</b>	
<b>End Date</b>	
<b>Monitoring Dates</b>	
<b>Assessor(s)</b>	
<b>Overall Assessment</b>	

### Introduction

[Outline (i) objective of the project, (ii) purpose of the Monitoring Visit, as set out in the TOR and in accordance with the Policy]

### Approach

[Summarise methodology in a visual way]

### Project Strengths

[Outline key project strengths, usually 2 – 5]

### Areas to Consider

[Outline any areas to consider, usually 2 – 5]

### Conclusion

[Provide short conclusion]

## Appendix 4 JOA-conducted Monitoring Visit TEMPLATE Monitoring Report

### Project Summary

<b>Project Title</b>	
<b>Organisation</b>	
<b>Partner(s)</b>	
<b>Country</b>	
<b>Total Project Budget</b>	
<b>JOA Grant</b>	
<b>Overall Objective</b>	
<b>Outcomes</b>	
<b>Start Date</b>	
<b>End Date</b>	
<b>Monitoring Dates</b>	
<b>Assessor(s)</b>	
<b>Overall Assessment</b>	

### Partnership History

[Provide brief summary of partnership, including previous projects and any ongoing challenges or concerns]

### Purpose

[Insert purpose, as set out in TOR]

### Location

[Summary of the project locations, as well as outline of the locations incorporated in the monitoring visit]

### Areas Reviewed

In the course of the monitoring visit, the following areas were reviewed:

- [Insert area of review]
  - [Insert sub-section]
  - [Insert sub-section]

### Approach

In the course of the monitoring visit, the following approaches were taken:

- [Insert approach, i.e. group discussions]

- [Insert specific activity, i.e. focus group discussions with 2 savings groups]
- [Insert specific activity, i.e. focus group discussions with committee members]

### Visit Summary

<b>Project Management</b>	[Insert comments]
<b>Financial Management and Procurement</b>	[Insert comments]
<b>Activities</b>	[Insert comments, linked to relevant output / outcome]
<b>Coordination, Ownership and Alignment</b>	[Insert comments]
<b>Partner M&amp;E</b>	[Insert comments]
<b>Visibility</b>	[Insert comments]
<b>Sustainability</b>	[Insert comments]
<b>Donorship</b>	[Insert comments]

### Other Observations

[Insert observations that may strengthen JOA thematic or contextual understanding but fall wider than the purpose of the Monitoring Report]

### Partner Feedback

[Insert feedback provided by partner organisation to JOA that is not otherwise reflected in the Monitoring Report]

### Community Feedback

[Insert feedback provided by community members to JOA that is not otherwise reflected in the Monitoring Report]

### Conclusion

[Insert conclusion that more explicitly outlines key findings than that set out in the Executive Summary]

**Further Action**

[No further action is required / insert details of further action recommended]



### Appendix 5 JOA Partner Feedback Matrix

#### Partner Response

<b>Monitoring Report</b>	[Insert Partner] is invited to share any further feedback or comments regarding the Monitoring Report – including – if relevant – any further action or updates that have been taken since JOA’s Monitoring Visit.
<b>Executive Summary</b>	[Insert Partner] is invited to share any further feedback or comments regarding the Executive Summary – including – if relevant – any further action or updates that have been taken since JOA’s Monitoring Visit.

## Appendix 6 Guidelines for JOA-funded Independent Evaluations

### Purpose

JOA is committed to facilitating learning in relation to JOA-funded projects, as well as JOA's three thematic areas; (i) Conservation Livelihoods, (ii) Dairy, and (iii) Financial Inclusion. All organisations applying for £450,000 or more of funding from JOA, in relation to a development project, ought to budget for an independent evaluation

An independent evaluation is an evaluation of a project or programme that is conducted by an independent and impartial individual or consultancy to assess its performance or impact. Independent evaluations are not intended to replace the end-of-project data collection responsibilities of JOA's partner, the results of which should be readily available for the evaluator.

### Commissioning of Independent Evaluations

#### Responsibilities

In most cases, JOA's partners are responsible for commissioning any independent evaluations. However, JOA reserves the right to commission an independent evaluation of a JOA-funded project or programme.

#### Procurement

Where JOA's partner is responsible for commissioning an independent evaluation, the evaluation should be procured in line with the procurement guidelines of JOA's partner, which are reviewed by JOA during the project selection process.

Where JOA is responsible for commissioning an independent evaluation, the evaluation should be procured in line with JOA's procurement guidelines.

All Terms of Reference for independent evaluators must be approved by JOA before being finalised. All procurements must uphold the principles of (i) value for money, (ii) accountability, and (iii) effective competition.

### Products

It is expected that, following the procurement process and evaluation period, an independent evaluation will be produced that provides practical recommendations and shareable lessons learned, in addition to an overarching evaluation of the project in accordance with the OECD criteria for evaluation.

The independent evaluation should be written in, or translated to, English and a full, un-expurgated independent evaluation should be made available to JOA.