# MODULE 3

## Monitoring, Evaluation and Reporting

You have passed the half way point of this training! You understand CONNECT and have planned your knowledge exchange visit. Now it is time to think about what has to be done after the programme, in terms of monitoring, evaluation and reporting.

**Module 3: Learning Objectives**

This module will enable you to:

- Fulfil the knowledge exchange's requirements for monitoring, evaluation and reporting;
- Comply with all financial regulations of the programme.

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## 3.1 Monitoring, Evaluation and Reporting

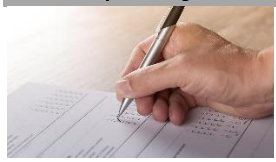
Your focus in this exchange will – of course – be on the preparation and implementation of the exchange mission. However, we want to use this opportunity to make you aware of the CONNECT requirements in terms of monitoring and evaluation (M&E), as well as reporting.

M&E is important to the CONNECT team. By spending some time on M&E both you, as participating municipalities, and us the CONNECT team will be able to better learn from the knowledge exchange. This will allow us to improve the CONNECT experience, and will allow you celebrate your successes, reflect on your challenges and identify follow-up actions. Moreover, it allows us to record the CONNECT achievements so that we can share the success stories with the broader public. Naturally, we also want to be able to justify the time and money spent on this programme to our donor and the tax payers.

The CONNECT team has developed three main tools to monitor and evaluate (M&E) the knowledge exchange activities. These are a compulsory part of the knowledge exchange, so please read the text below and the associated templates carefully. Note that the templates are available in English, French and Spanish.

The video below is an introduction to the process of monitoring and evaluation needed to complete the CONNECT programme:

## Joint Reporting



What is it: This is an evaluation tool that asks the receiving and visiting municipalities, as well as other relevant stakeholders to jointly evaluate and report on the exchange event, its implementation, the results, the lessons learned and challenges faced.

Who is involved: The receiving and visiting municipalities, as well as other relevant stakeholders

How does it work: We have developed a template for this report (here).This form must be filled out by all relevant stakeholders through a meeting at the end of the knowledge exchange mission and submitted to the CONNECT team no later than 2 weeks after the mission. For detailed information on how to organise this meeting, who to involve and what should be reported on please consult the joint reporting template (here).

## Satisfaction survey

What is it: This is an electronic questionnaire that has to be filled out by both the visiting and receiving municipalities in order to measure your perceptions on the results achieved as well as your satisfaction with the CONNECT mechanism and its tools.

Who is involved: The survey must be filled out by 1 person from the visiting municipality and 2 people from the receiving municipality. Preferably, it is filled out by the direct participants of the exchange, who were also involved in the preparation.

How does it work: The CONNECT team will send you the link to the electronic form 4 weeks after the knowledge exchange mission is finalized. It should not take you more than 1 hour to complete the questionnaire.

## Change Tracking

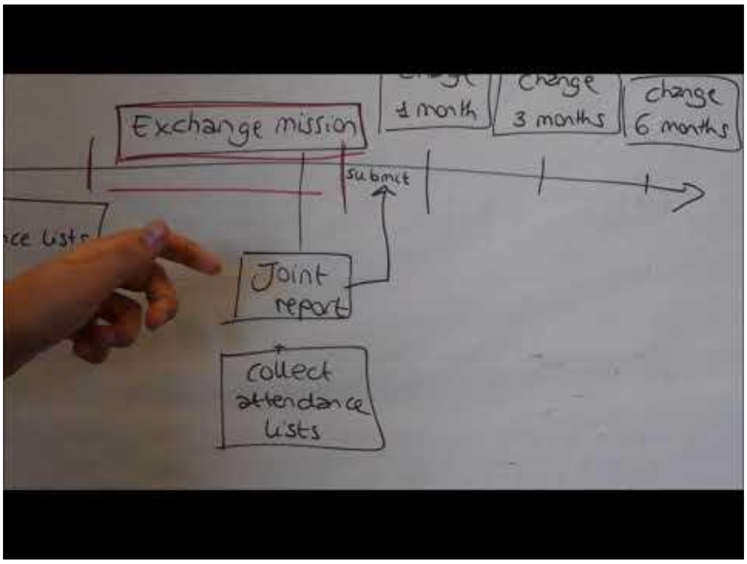
What is it: This is a tool to describe the real changes that occurred as a consequence of the knowledge exchange in the receiving municipality.

Who is involved: Change tracking is done 2 people (“change trackers”) from the receiving municipality, who have played an active role in the exchange and who are willing to keep track of changes in the next months.

How does it work: The receiving municipality must report on the change observed as a result of the exchange activity at three moments: after 1 month, after 3 months and after 6 months. We want to hear specifically about *concrete and observable* changes that *you have seen around you* after the knowledge exchange that has took place. We especially want to hear what the change was, when and where it occurred and to whom. Also, we are curious to hear how important the change was and to what extent the knowledge exchange contributed to it. During your joint evaluation workshop, make sure to identify 2 people who can take on this role. It is important that these people can report in English, French or Spanish.

We have developed a template that must help you describe the changes we have developed a change tracking template (here). If you are the *change tracker*, you will fill this form out at these three moments. The CONNECT team might want to discuss the change tracking report with the receiving municipality. This discussion can take place through email or a Skype meeting. If you have filled out all change tracking forms after six months, you will receive a **CONNECT certificate of excellence**.

Did you get lost in all the different M&E tools of CONNECT? Here is a video which will provide you with a short overview:




## Attendance lists

Next to these three M&E tools it is important that an attendance list must be signed by all present participants every day of the programme. This is a requirement by our donor, the European Union, and if we do not have these attendance lists we will not be able to reimburse the costs related to that activity. You can find a template for the attendance list (here), and an example of the document below.

## Video Message

At the end of the programme, the CONNECT participants have to jointly record a short (2-3 minute) video report of the knowledge exchange. Don't worry, it does not need to look too professional. A recording with your phone is fine. We want fun messages that briefly explain the objective of the knowledge exchange and report on the main highlights and lessons learned of the knowledge. We will share these videos with future CONNECT participants to give them a sense of the CONNECT experience.

CONNECT

Sharing local and regional governments' expertise worldwide

| | |
|---|---|
| Project number | 11347.3.1 |
| Title of the project | 2017 Cambodia 001 - Human Resources Management |
| Title of the Activity | Knowledge exchange Pursat municipality – Sandgerdi municipality |
| Responsible European municipal expert | |
| Responsible Beneficiary municipal expert | |
| Date (dd-mm-yyyy) | |
| Location | |

Attendance list

| | Name of participant | Gender (M/F) | Name of organisation / department | Function / Title | Email address | Signature |
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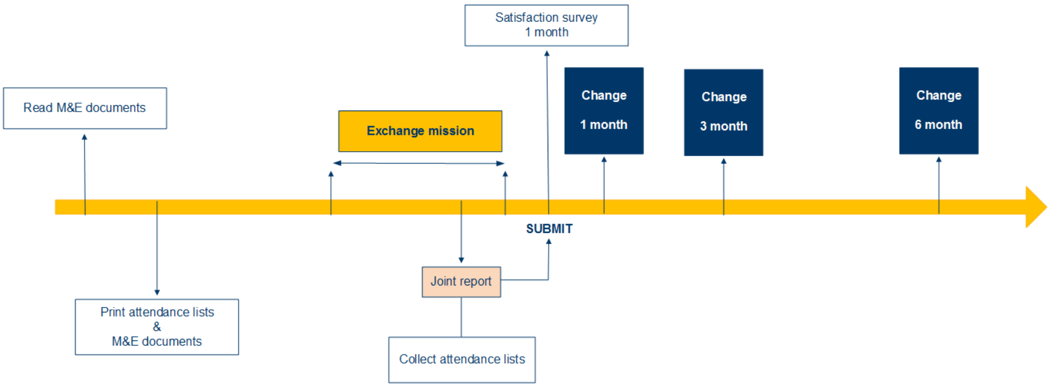
Signature organizing local or regional government:

**M&E planning**

Please make sure you integrate the M&E in your planning before, during and after the mission. To make this easy for you we have made a short time-line outlining when each of the M&E moment will take place, see the graph and check-list table below:




| **When** | **What** | |
|---|---|---|
| Prior to the mission (as part of this training) | • Understand the M&E tools<br>• Print attendance lists for every meeting | √ |
| During the mission | • Collecting of signed attendance lists | |
| At the end of the mission | • Meeting to fill in the joint reporting template<br>• Recording a short (2-3 minute) video report of the knowledge exchange | |
| No more than 2 weeks after the mission | • Submission of the joint report to the CONNECT team | |
| 4 weeks after the mission | • Filling out of the satisfaction survey online | |
| 4 weeks after the mission | • First change tracking moment (send in by email) | |

| | | |
|---|---|---|
| 3 months after the mission | • Second change tracking moment (send in by email) | |
| 6 months after the mission | • Third and final change tracking moment (send in by email) | |
| 1-6 months after the mission | • Email or Skype discussion with the CONNECT team on change tracking | |

## 3.2 Financial Procedures

Please carefully read the financial reporting guidelines (here). Here you will find detailed instructions about what types of costs are eligible (visa costs) and which are not (e.g. parking costs). Also, the guidelines clearly outline how these costs should be reported and what proof is required (e.g. all original boarding passes). Past experience has shown it is important to review these guideline carefully in order to avoid disappointment at a later point. After you completed all financial reporting obligations please read the invoicing instructions (here).

| Exercise 3.A: The monitoring, Evaluation and Reporting Quiz |
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| After having gone through all the readings for this module, you should have all the knowledge you need to comply with the financial procedures and fulfil all the monitoring and evaluation requirements. To test your knowledge please complete the following Quiz:<br>**https://nl.surveymonkey.com/r/TWLMTTR**<br><br>You can take it as many times as you need to get a 100% score |