



Gijima KZN Monitoring System - Monitoring Visits

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What approaches to monitoring does Gijima undertake?



- **Physical Site Checks**
- **Progress Update Meetings**
- **Monitoring Report Submission**
- **Full Monitoring Visits**



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Why do we undertake monitoring visits?



- To focus on the project's management and achievement of outputs.
- To provide a structured opportunity for reflection and amendments in delivering the project.
- To rectifying mistakes and make adjustments while the project is still in the implementation phase.
- To offer the project manager a way of identifying and securing any support that is required to assist the project to be implemented to meet its objectives.
- Through monitoring an individual project supported from the Gijima KZN Programme we can test the project management systems of the particular organisation – we are not just checking on a project.
- These monitoring visits should be viewed in a positive light by beneficiaries and the institutions responsible for managing and implementing grants under the Gijima KZN Programme.



Why do we undertake monitoring visits?



- **To identify areas of good practice and build up information on lessons in LED that can be shared with other LED stakeholders.**
- **To periodically review administrative and control mechanisms for effective programme management.**



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What's involved in preparing for a monitoring visit?



- **Personnel that understand the project must be available for the monitoring visit (at a minimum the project manager & the financial officer but often the procurement officer is required too)**
- **All relevant documentation must be available – this will be notified in advance by the M&E team.**
- **Previously submitted monitoring reports & the information they contain will act as the basis for the monitoring visits.**
- **Monitoring visits will take place where information on project performance will be recorded and compared against objectives to assess potential under performance and deviations from approved budget.**



What's involved in hosting a monitoring visit?



- **The Project Management Team will be expected to give up time to meet with the monitoring team.**
- **In addition to the time for preparation there may be the need for follow up correspondence.**
- **Discuss the effectiveness of the general and financial management of the project and any systems in place.**
- **Review the publicity provisions.**



What's involved in hosting a monitoring visit?



- **Review the achieved outputs reported against the approved targets and discuss if the project is likely to achieve these within the given timescale;**
- **Discuss the systems in place for the monitoring of these outputs and any non-quantifiable outputs which may have developed;**
- **Visit the physical location of the project (in addition to the premises where the grant beneficiary is based) and discuss any implementation problems/unforeseen circumstances;**
- **Discuss with project applicants any proposed changes to the project prior to their implementation;**
- **Draw up a proposal for any action required to be undertaken by either the PCU/Contracting Authority or the grant beneficiary.**



What's involved in hosting a monitoring visit?



- We want to determine the “story” of the implementation of the project being visited :
 - What challenges were encountered?
 - How were these challenges overcome?
 - What internal factors proved positive/negative?
 - What external factors have had positive/negative influence on the project?
 - How did the Gijima systems impact on the management and delivery of the project?
 - What are the interventions that the GB could see as being required to complete the project and meet the project's objectives?
 - Are there any areas where the project will not meet its objectives?
 - Are these shortfalls material to the project?
 - Do they have budget implications?
 - Have there been any unintended consequences as a result of the project (positive and negative)?
 - How have the partnership arrangements worked?
 - Are there any experiences that the GB has used to inform managers on other projects?
 - Are there lessons that Gijima can take to other projects?
 - Would the organisation apply for EU funds through Gijima again?



What can you expect as a result of a monitoring visit?



- **The Gijima KZN monitoring officer will prepare a report detailing the discussion held and any action points which require attention.**
- **A copy of this report should be sent to and agreed upon by the Grant Beneficiary.**
- **Lessons from the monitoring will be distributed between all Grant Beneficiaries in a generic way – through Programme reports.**





THANK YOU



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