



# Gijima Monitoring System - Monitoring Visits

**Redlands Hotel**

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**PIETERMARITZBURG**



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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?



## From a Programme Perspective:

- **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.**



# Why do we undertake monitoring visits?



## FROM A PROJECT PERSPECTIVE:

- 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 identify inconsistencies or underperformance 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 so as to meet its objectives.
- 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.



# 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 – you will receive a list of documentation needed by the M&E team in advance of the meeting.**
- **Previously submitted monitoring reports & the information they contain will act as the basis for the monitoring visits.**
- **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 do we do on 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 timeframe;**
- **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 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.**



# Question that might be asked on a monitoring visit?



- We want to determine the “story” of the implementation of the project :
  - 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 KZN 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 KZN can take to other projects?



# 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 will 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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