



INTERNATIONAL  
PROJECT

MONITORING &  
EVALUATION

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International Project Design & Management

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# INTRODUCTION

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Over 13 years in the field of **EU Financial Instrument and EU funded projects**

Provide **consultancy and trainings all around EU**

Project Board, INTAMT DE

Planning

Assistance in writing

Facilitation

Evaluation

# WHERE WE ARE REACHING AT



Understand the bottom roots of M&E process



Understand why M&E is requested and needed



Understand how M&E connected to PCM and LFM



Understand what M&E activities to implement and when



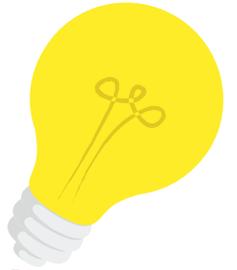
Understand how to improve an application

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10. WHAT TO CONSIDER IN THE APPLICATION & BUDGET

IMPORTANT TO REMEMBER  
WHAT YOU KNOW AND CAN



# RESULT ORIENTED APPROACH

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**Result oriented** describe an individual or organization that **focuses on result** rather than process

**most effective**

**economical**

# RESULT ORIENTED APPROACH

keep the focus on **achieving results**

**define** all the related **tasks and activities** in terms of the **results to be achieved**

**put** the required **efforts and time needed** to accomplish those tasks and activities

# RESULT ORIENTED MONITORING (ROM)

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M&E activities provide the EU Financial Instrument with hard **evidence** about how actions are **implemented**, to **improve** project design, efficiency, and accountability

# RESULT ORIENTED MONITORING (ROM)

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## EVIDENCE

01

### Planning

- Indicators
- M&E Plan
- Application, Budget

## IMPLEMENTED

02

### Implementing

- M&E activities

## IMPROVED

03

### Reporting

- Steering Committee
- Submitted Reports

# EU FINANCIAL INSTRUMENTS

## EC

Executive bodies, Agencies

## NAs

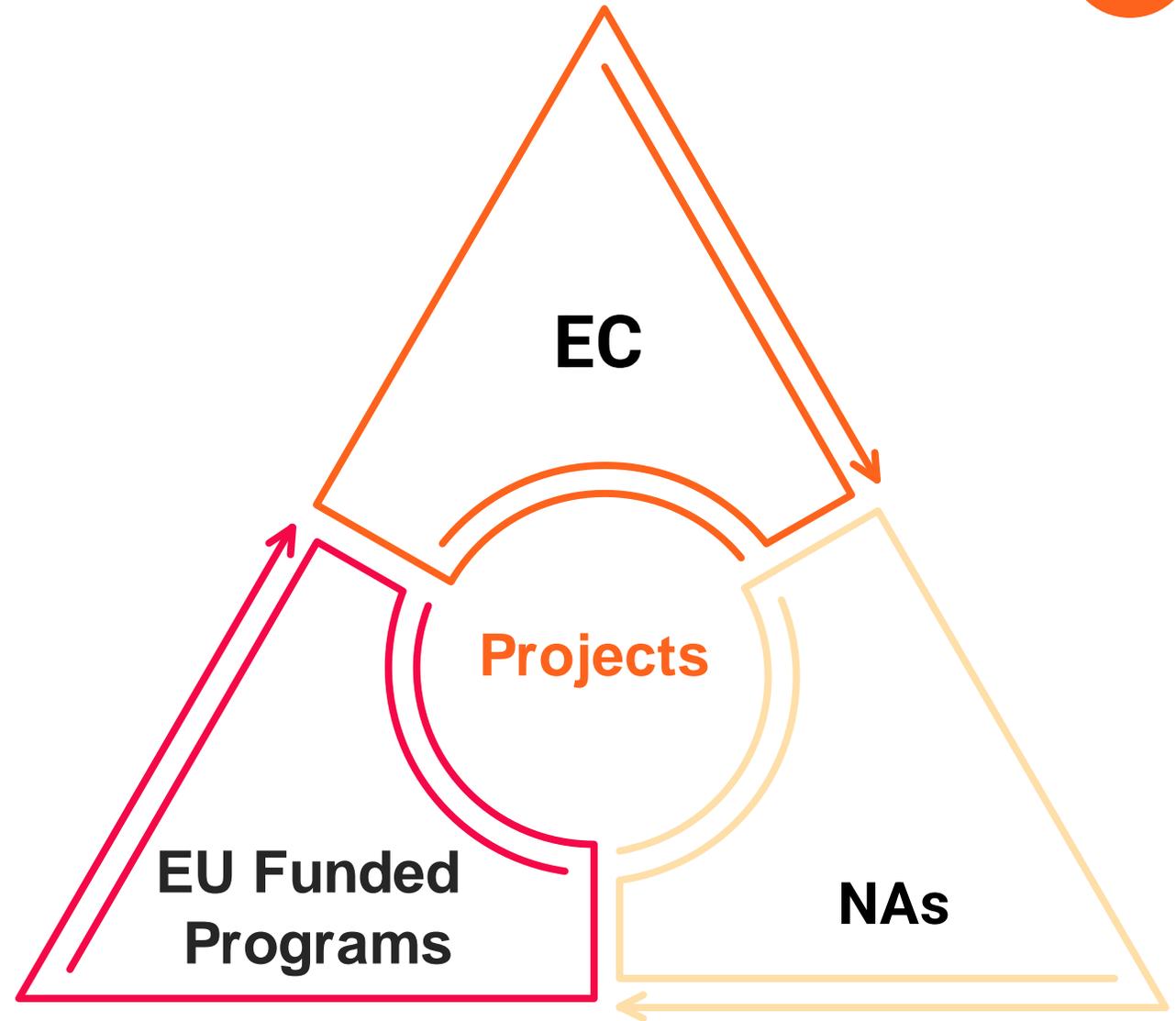
Ministries

## EU Funded Programs

Erasmus+  
Interreg Europe  
Horizon Europe 2021  
Kolactic CBC

## Projects

Organizations cooperating  
across borders and funded by  
EU funded Programs



# EU FINANCIAL INSTRUMENTS

CORELATED  
ELEMENTS



A

e.g., support education, training, youth and sport in Europe

B

# EU FINANCIAL INSTRUMENTS

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## Identification

PC of Partner countries meets to discuss new program

01  
STEP

02  
STEP

## Formulation

priorities,  
implementation,  
finance, M&E, public  
consultations

03  
STEP

## Financing

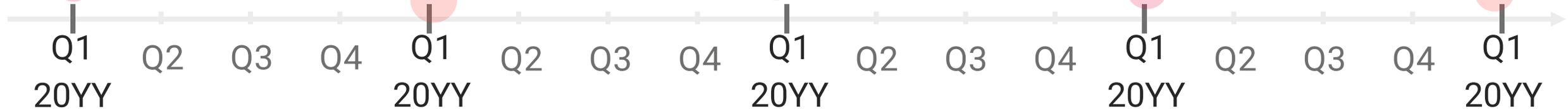
Partner countries  
approve the  
Program and sign  
Partner State  
Agreement

## EC approves

04  
STEP

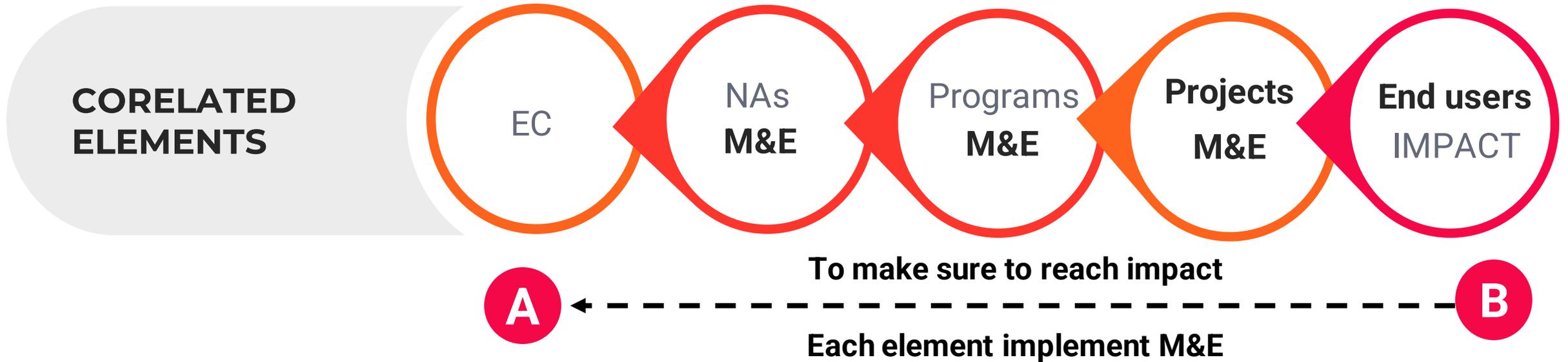
## Implementation

05  
STEP



EU Financial Instruments **follows the same cycle as projects**  
only at **larger scale**

EU Financial Instruments **implements the same M&E activities as projects** only at **larger scale**



# TYPES OF MONITORING & EVALUATION

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EU Financial Instruments' Monitoring & Evaluation

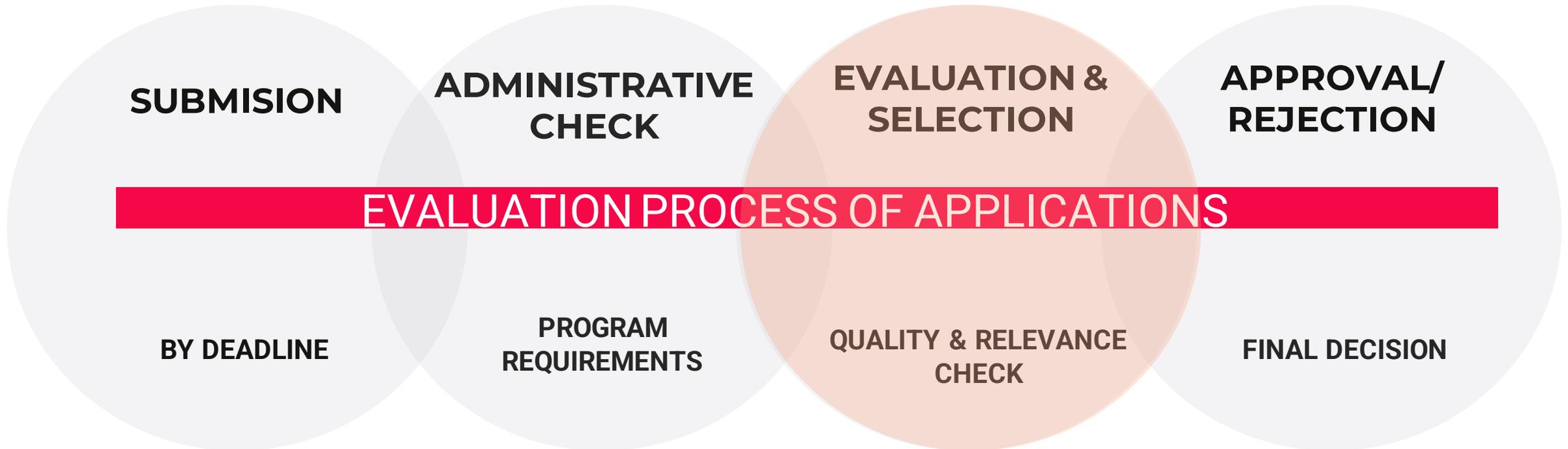
Evaluation of applications

Project Internal Monitoring & Evaluation

Project External Monitoring & Evaluation

# EVALUATION OF APPLICATION

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**Evaluation criteria are given !**

# EVALUATION OF APPLICATIONS

1. Be **objective**
2. Use **'human being language'** in your application
3. Use **given evaluation grid/ questions/ criteria** to self-evaluate an application
4. Check the **ranking of points for certain question**
5. Follow the **certain logic** of the application
6. Be **clear** in expressing yourself
7. Make sure that your idea is in line with **regional, national strategies, programme priorities**
8. Make sure that **you understand the project** by yourself

# EVALUATION OF APPLICATION

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**Evaluators** are also people

Well planned **Monitoring & Evaluation** raises the **quality** of  
application

# PROJECT INTERNAL M&E – REQUIREMENTS

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## Application



- described M&E activities
- allocated budget
- described indicators

## Ongoing project



- have M&E Plan
- collect indicators
- have Steering Committee
- Implement M&E activities
- submit reports (narrative & financial)

## Project closure



- conduct project evaluation
- submit final report

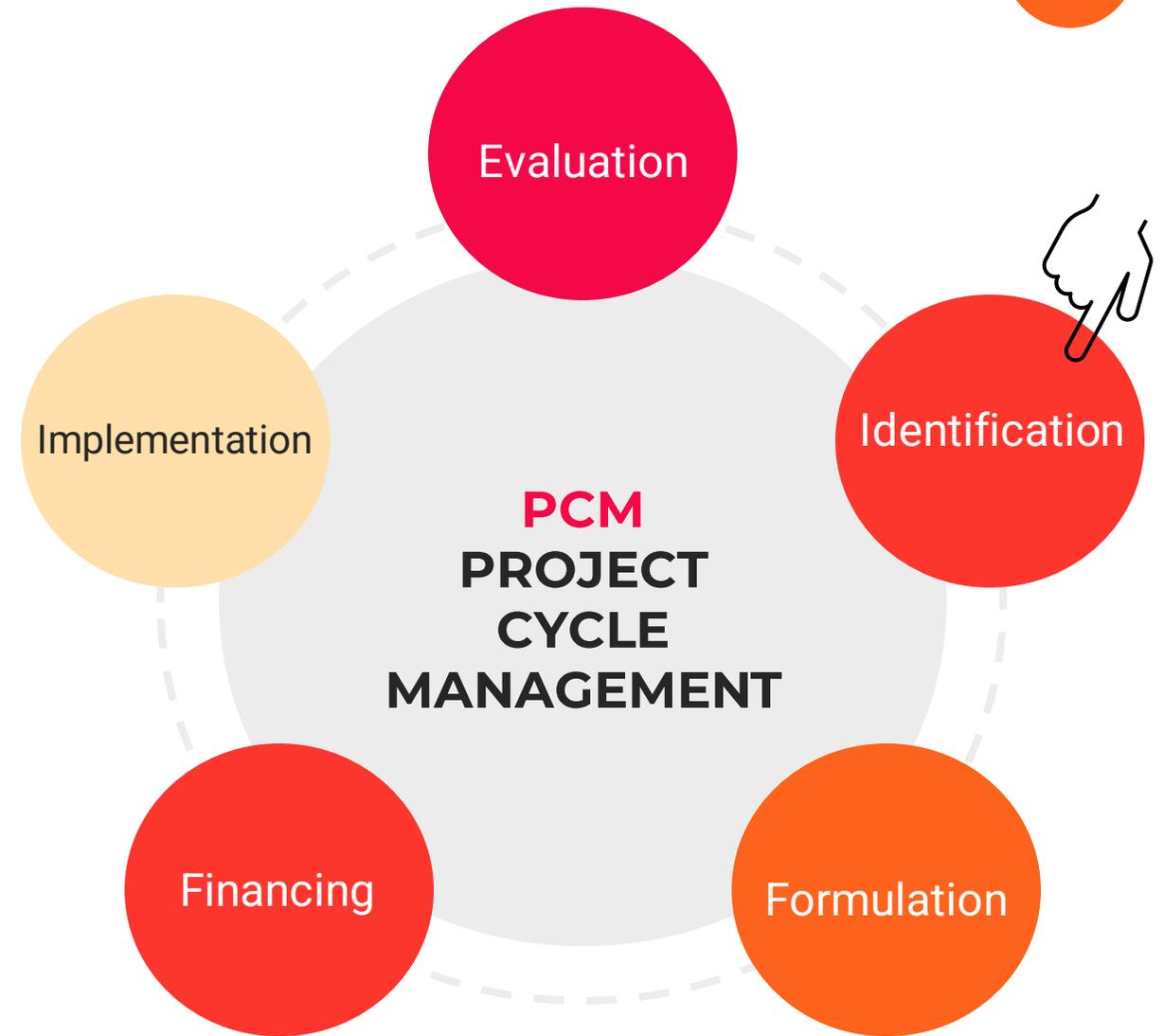
# PROJECT INTERNAL M&E – REQUIREMENTS 20

EU Financial Instruments **need to be sure** that **project will deliver results**

# CONNECTION TO PCM

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- **Identification:** develop indicators, identify risks
- **Formulation:** plan M&E , describe M&E in the application; allocate budget for
- **Financing:** *evaluation of applications*
- **Implementation:** M&E Plan, reporting on progress
- **Evaluation:** mid-term, ad hoc evaluation, final report



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**Where you are at?**

# PROJECT INTERNAL M&E – STEPS TO TAKE

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## 1 IDENTIFICATION

Design indicators in LFM

## 2 FORMULATION

Plan M&E activities

Allocate budget

Describe M&E in the application

Consider evaluation criteria in application

## 3 IMPLEMENTATION

Draft M&E Plan

Designate SC

Implement M&E activities

Collect indicators

Inform SC

Report to EU FI

## 5 EVALUATION

Conduct mid-term evaluation

Conduct ed hoc evaluation

Send Final Report

# CONNECTION TO LFM

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**Overall Objective**

**Specific Objectives**

**Indicators**

**Source of Verification**

**Assumptions**

**Results**

**Indicators**

**Source of Verification**

**Assumptions**

**Activities**

**Indicators**

**Source of Verification**

**Assumptions**

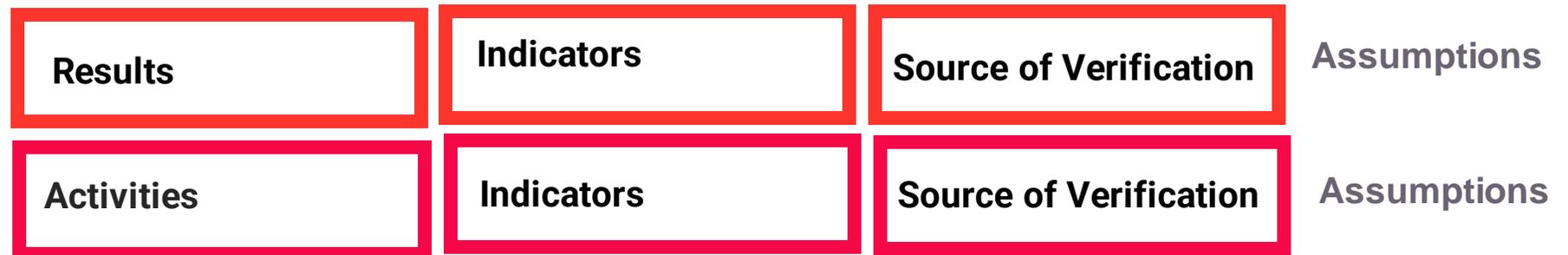
# PROJECT INTERNAL MONITORING

**Monitoring activities** is a mechanism by which **relevant information** is provided to the **right people** at the **right time** to help them make informed decisions

# PROJECT INTERNAL MONITORING

Have **Activities** been completed as planned?

Have **Results** been produced as foreseen?

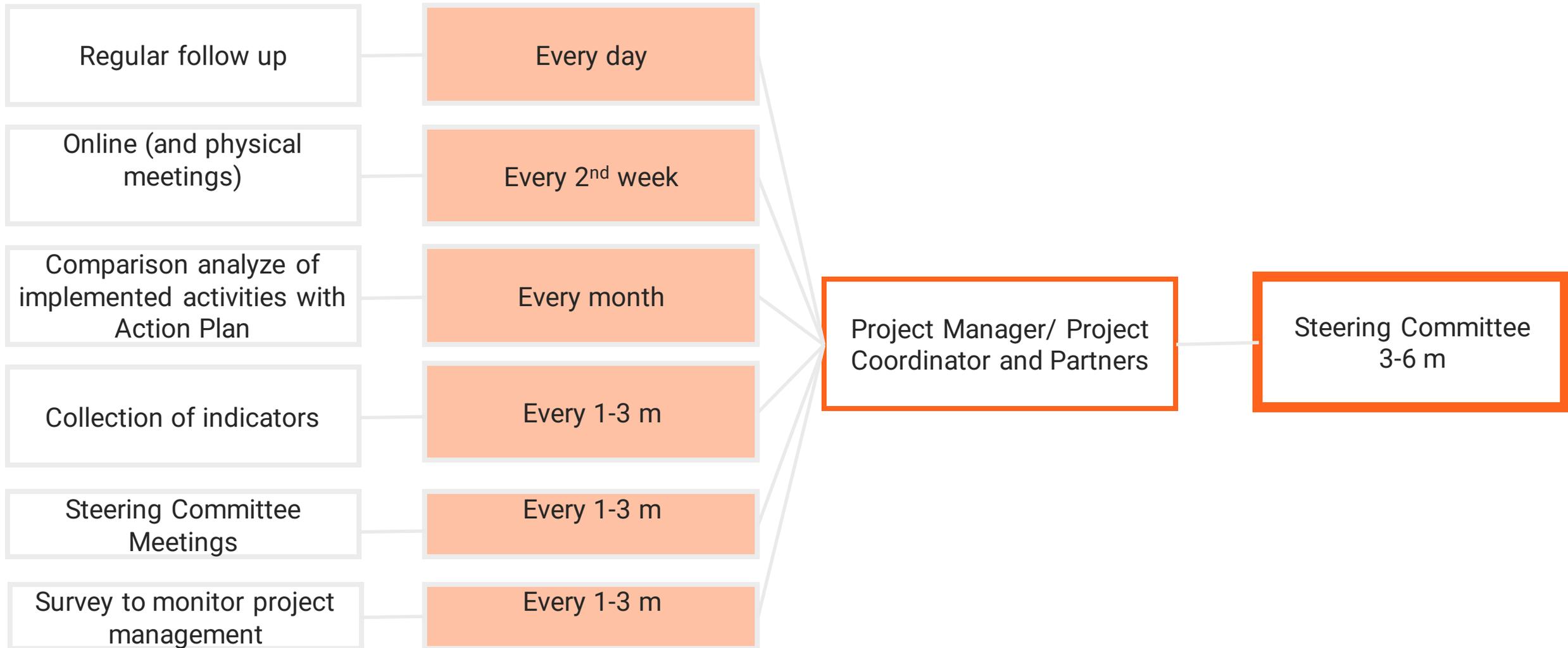


# PROJECT INTERNAL MONITORING

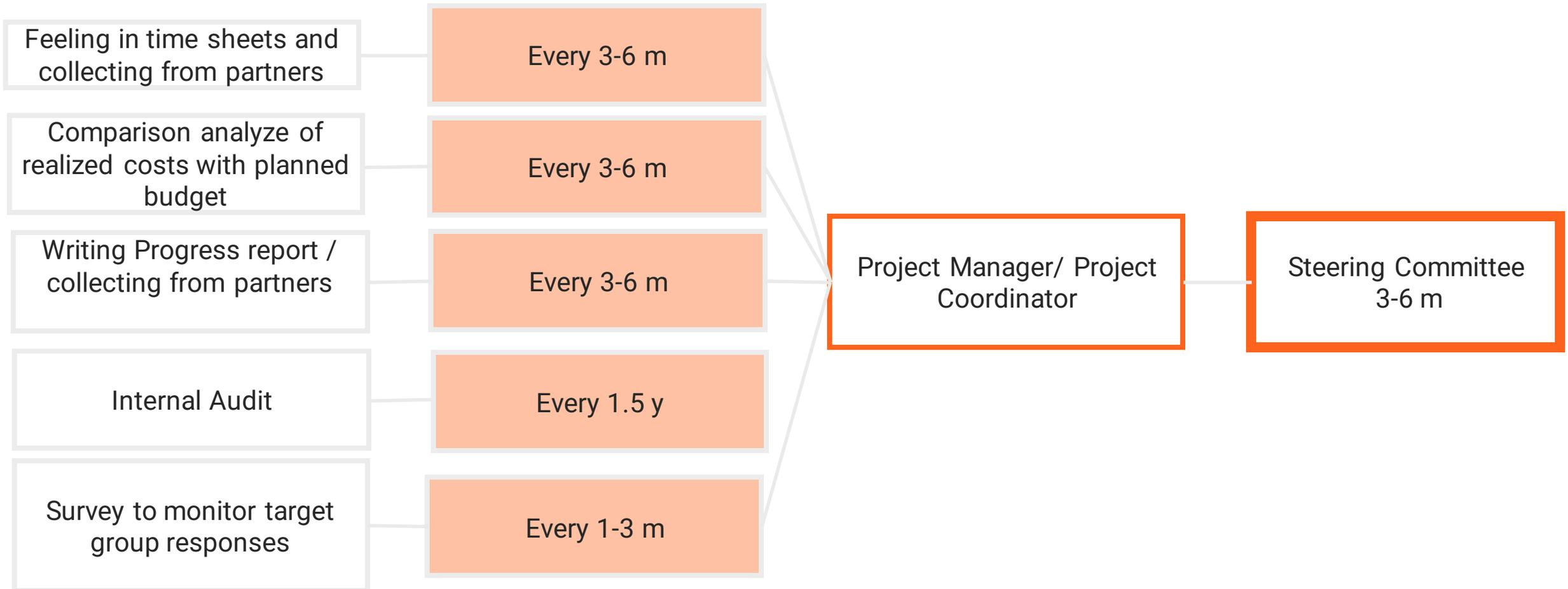
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# PROJECT INTERNAL MONITORING



# PROJECT INTERNAL MONITORING



# PROJECT INTERNAL MONITORING

There was an **important job** to be done and **Everybody** was sure that **Somebody** would do it. **Anybody** could have done it, but Nobody did it. Somebody got angry about that, because it was Everybody's job. Everybody thought Anybody could do it, but Nobody realized that Everybody wouldn't do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have.

# PROJECT INTERNAL MONITORING

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Re-scheduling the project



Re-planning activities in the Action Plan



Re-planning project management methodology



Re-designing project indicators



Re-budgeting the project



Re – assigning the staff

## Evaluation activities

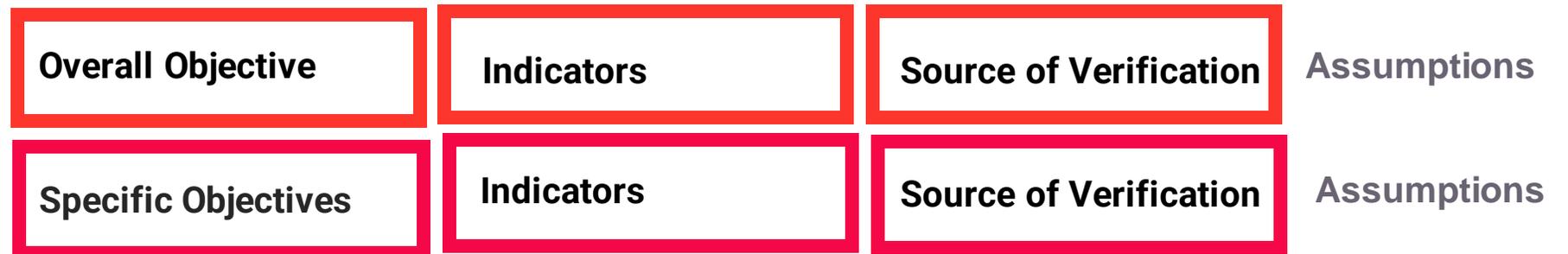
In the middle - should find out if the project is **performing as planned** and if needed **to improve** the project efficiency and impact while the activities are still ongoing.

And at the end - **to present the achievement of the project and lessons learnt**

# PROJECT INTERNAL EVALUATION

Is **Overall Objective** still relevant?

Are **Specific Objectives** still achievable?



# PROJECT INTERNAL EVALUATION

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**Relevance:** To what extent are the project's objectives justified in relation to the needs of the chosen e.g., Erasmus+ Priority?

**Effectiveness:** To what extent have the project's objectives been achieved?

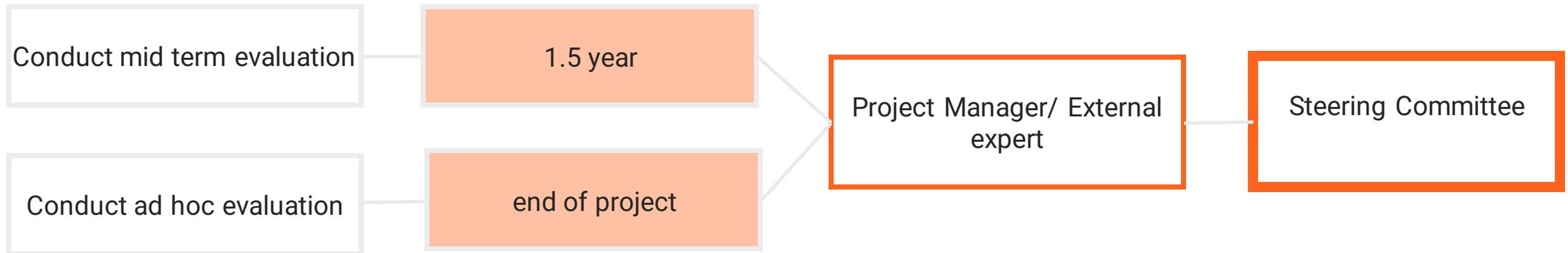
**Efficiency:** Have the planned results been achieved at the lower costs?

**Sustainability:** Will project results will continue if there is no more funding?

**Impact:** Has the project produced/ is going to produce the expected impact? Did the project have an impact on the target groups in relation to their needs?

# PROJECT INTERNAL EVALUATION

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# PROJECT INTERNAL EVALUATION

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Re-planning Objective(s)



Re-planning activities



Re-budgeting the project



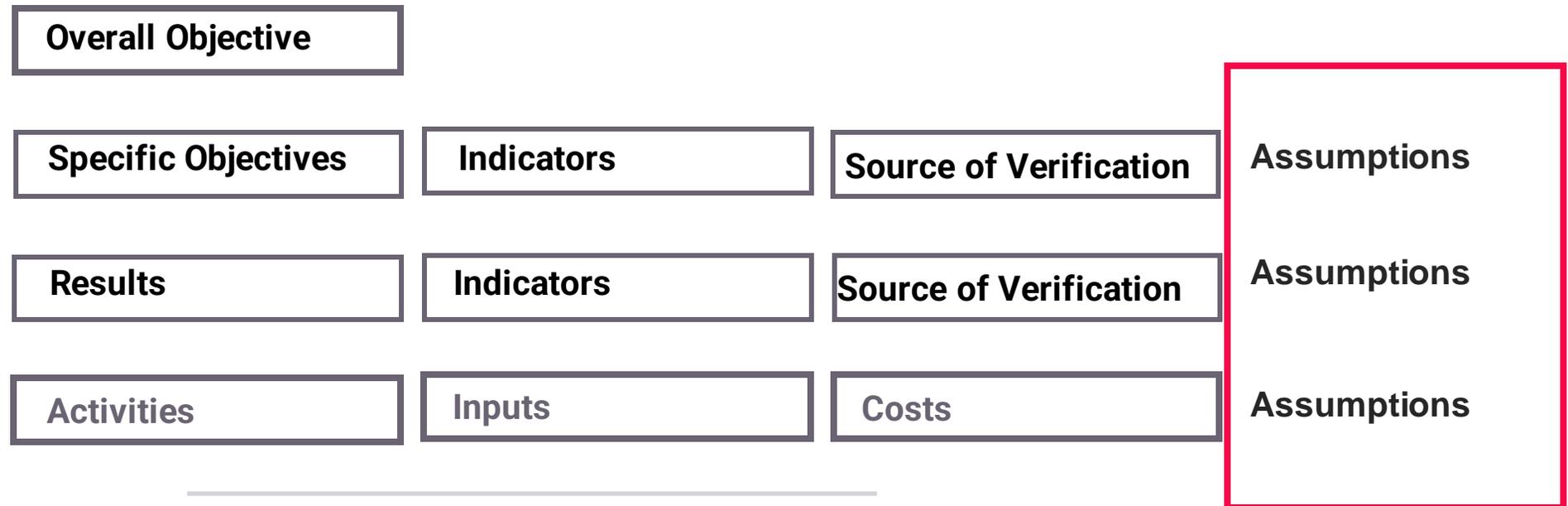
Re-designing project indicators



Collecting lessons learnt for future projects

# RISK MANAGEMENT

monitor assumptions to identify whether they are true, what new risks may be emerging, and to take action to handle those risks



# RISK MANAGEMENT

**STEP 1.** Identify which risks or threats are likely to affect the project implementation and expected results\*

**STEP 2.** Analyse how risks might affect the success of the Project

**STEP 3.** Evaluate the **likelihood** of a risk being realized and the **seriousness** should the risk occur

- \*
- Project expected results are delayed or reduced
  - Timeframes are extended
  - Costs are increased

# RISK MANAGEMENT

## Likelihood

- High – Greater than 70% probability of occurrence
- Medium – between 30% and 70 % probability of occurrence
- Low – below 30% probability of occurrence

## Seriousness

- High – risk that has the potential to greatly impact on Project implementation
- Medium – risk that has the potential to slightly impact on Project implementation
- Low – risk that has relatively little impact on Project implementation

Likelihood (probability)	Seriousness (impact)		
	Low	Medium	High
Low	C	C	B
Medium	C	B	A
High	B	A	A

# RISK MANAGEMENT

Grade	Possible Action
A	Avoid/Mitigate/Accept
B	Avoid/Mitigate/Accept
C	Avoid/Accept

- **Avoid** – eliminate the risk and implement activities to avoid it
- **Mitigate** – identify ways to reduce the impact of the risk
- **Accept** – note, nothing will be done

# RISK MANAGEMENT

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Risk revision

3-6 m

Project Manager/  
Project  
Coordinator

Steering Committee

# MONITORING & EVALUATION PLAN

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improves the quality of M&E activities carried out by the project

relevant for the whole project duration with possibility to update every year (Version 1, etc.)

provides detailed description on M&E activities, including timing, responsible persons, etc.

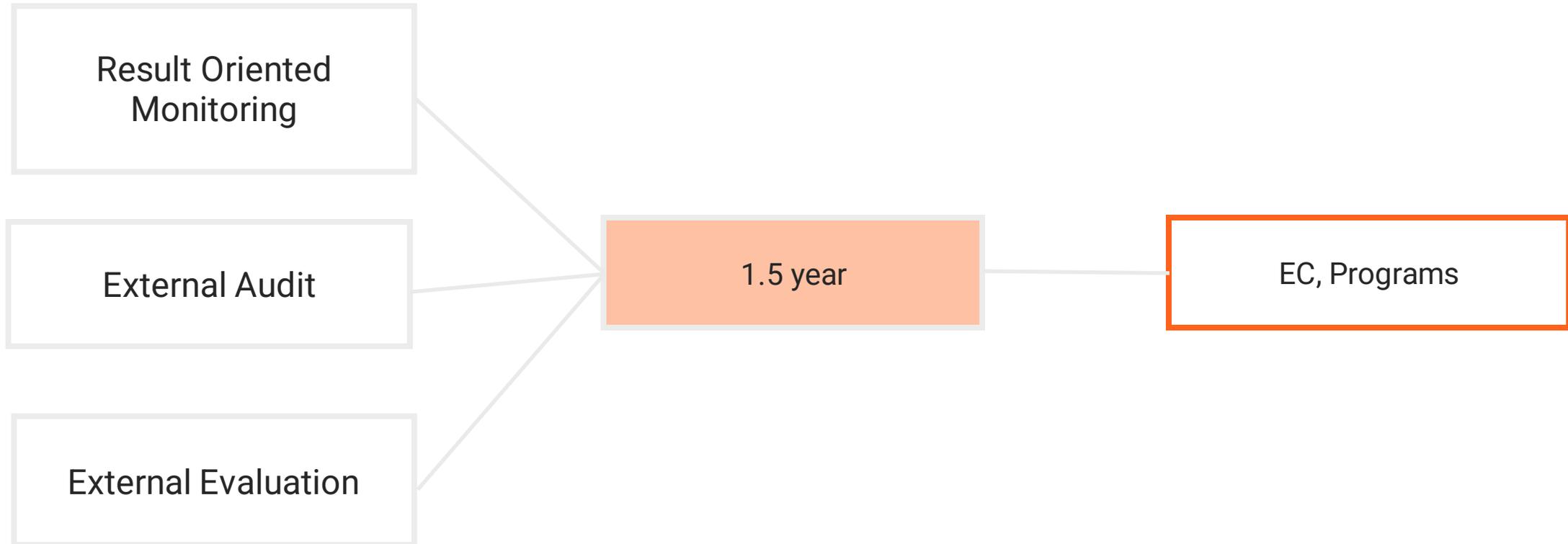
# MONITORING & EVALUATION PLAN

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1. Introduction
2. Purpose of M&E activities
3. Internal Project Monitoring activities
4. Internal Project Evaluation activities
5. Risk Management
6. Indicators
7. Responsibilities and timing

# EXTERNAL PROJECT M&E



# TO INCLUDE IN THE APPLICATION

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## 1. Evaluation criteria

Self evaluate application  
by using evaluation  
criteria provided by  
Program

## 2. M&E activities

Describe:

- how you will implement it
- who is responsible
- what is the timing

# TO INCLUDE IN THE BUDGET

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Number of offline meeting with Steering Committee

Timing (h) of Projects Manager/ Coordinator spent for M&E activities

External expert to carry out mid-term/ and ad hoc evaluation

# IMPORTANT TO REMEMBER

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M&E activities are based on Result Oriented Approach

Projects are an element of Financial Instruments structure

M&E activities are not only an obligation, but an important tool to steer project implementation

Going wrong is ok, do you have a plan (M&E plan) to get back on the track?

Financial instruments expect you to have evidence (M&E) of delivering results

# WHAT YOU KNOW AND CAN

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- What FI consists of
- How applications are evaluated
- Most common mistakes
- How M&E connected to PCM and LFM
- Different types of M&E
- What Internal Project Monitoring consist of
- What Internal Project evaluation consist of
- What External Project evaluation consist of
- Improve quality of application
- Define M&E activities
- Define indicators
- Define Risks
- Draft M&E Plan

**Knowledge**



**Skills**



# NEXT STEPS TO TAKE

STEP 1. Define Indicators and identify risks

STEP 2. Indicate Indicators and risks (assumptions) in the LFM

STEP 3. Plan M&E activities, including Risk Management

STEP 4. Describe M&E activities in the application: **monitoring, evaluation, risk management**

STEP 5. Update budget, if needed

**THANK YOU!**

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