

Annual report



International Federation
of Red Cross and Red Crescent Societies

Planning, monitoring, evaluation and reporting (PMER)

Appeal No. MAA00014

21 April 2011

This report covers the period 1 January to 31
December 2010.



These women from a community-based action team are planning to secure homes and village sites as part of a training provided by the Red Cross. Trainings on improved project planning and monitoring evaluation are key to improving the quality of programmes around the world.
IFRC

In brief

Programme purpose: Planning, monitoring, evaluation and reporting process and practice supports quality service delivery and accountability in programmes.

Programme summary: In support of this long-term objective, the 2009-2010 plan covered in detail two specific initiatives for which funding was sought:

Putting in place a Federation-Wide Reporting System (FWRS):

- Fifty-six National Societies have participated in one of the two pilot phases;
- The system and key resources have been revised, and new supporting documents such as examples and templates developed;
- The FWRS Information Technology (IT) platform data management page has been launched and tested. Development of the FWRS IT platform reporting page has started with a launch date planned in the first semester of 2011.
- This main responsibility for this output is now handled by the Performance Development department since the last quarter of 2010.

Developing a planning, monitoring and evaluation training:

- An additional 209 people were trained, bringing the cumulative total to 305 people trained (and registered on the IFRC's online learning platform).
- By December 2010, 22 potential PMER facilitators were identified, of which 11 were trained. However, seven have since left their position.
- Resource materials on project/programme planning have been disseminated in five languages. Materials on monitoring and evaluation (M & E) have been developed and piloted.

- The development of an online training course in PMER begun towards the end of 2010, for delivery and roll out in 2011.

Financial situation: The total 2010 budget is CHF 401,507 of which CHF 365,974 (91 per cent) covered during the reporting period (including opening balance). Overall expenditure during the reporting period was CHF 281,032 (70 per cent) of the budget.

[Click here to go directly to the financial report.](#)

No. of people we have reached: See above for number of people trained/facilitators identified.

Context

The increasing recognition of the importance of planning, monitoring and evaluation and reporting (PMER) was underscored by the adoption of Strategy 2020 (S2020). The achievements outlined below constitute some of the key mechanisms through which the performance and accountability aspirations outlined in the new S2020 10-year strategy will be sought.

In order to more effectively address the wide variety of issues in the area of performance and accountability, and as part of the restructuring of the secretariat in Geneva, the issues previously handled by one department (PMER) have now been distributed over two newly-created departments:

The Planning and Evaluation department ensures the Strategy 2020 rollout; and provides technical and capacity building support and advice to secretariat offices and National Societies on their strategic and operational plans, monitoring systems and processes, and evaluation and reviews

The Performance Development Department supports National Society capacity building in three key ways: the roll out of the Federation-Wide Reporting System; developing a databank of objectively-analysed National Society capacities; and developing a system to assess and certify National Society capacity.

The human and financial resource constraints in all areas of PMER continue, however, to hamper to some extent the quick roll out of the various initiatives described in this report.

Progress towards outcomes

The planning, monitoring, evaluation and reporting programme budget is CHF 0.8m (USD 0.8m or EUR 0.5m).

Programme purpose
Planning, monitoring, evaluation and reporting process and practice supports quality service delivery and accountability in programmes
Programme component 1: Coherent PMER systems
Outcome 1: Coherent PMER systems linking Federation-wide, National Societies and secretariat systems are in place
Output 1.1 (for which funding is sought): Federation-wide monitoring system is in place and used by National Societies

Achievements

Following the adoption in principle of the FWRS by the General Assembly at its November 2009 meeting in Nairobi, the following progress have been made in 2010:

- **Identifying secretariat focal points**

Zonal focal points to support the implementation of the FWRS in National Societies have been identified. These focal points have been, and will be working in close collaboration with the FWRS focal point at the secretariat in Geneva. The FWRS focal point at the secretariat in Geneva will provide capacity-building support and feedback for improving the FWRS.

- **Testing and refining the system**

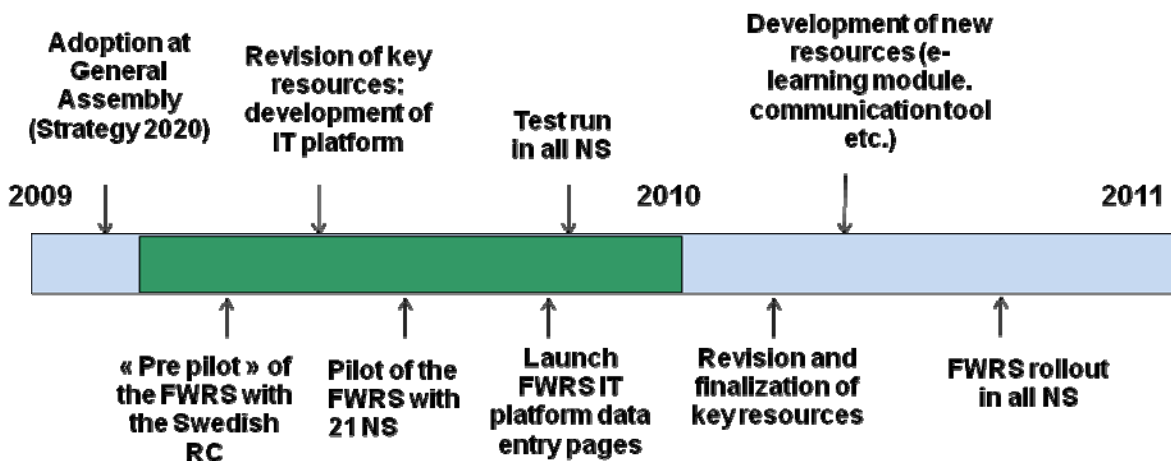
The FWRS went through successive rounds of pilot and test phases leading to changes and refinement of the FWRs and its key resources. The FWRS was first tested and discussions held on it, during a site visit to the Swedish Red Cross, which included meetings with key staff from the international and domestic departments, as well as staff from the Stockholm branch. The revised methodology and resources were then tested with selected National Societies from all the zones over the summer, followed by workshops in some of these societies. Finally, all National Societies that didn't have the opportunity to familiarize themselves with the FWRS, assess internal reporting mechanisms and provide feedback on the FWRS during the piloting phase were invited to participate in a test run. Overall, 56 societies took part in either one of these testing phases, reported on the key proxy indicators and provided feedback on the FWRS.

The comments and suggestions received have informed the revision of the FWRS and its key resources, and led to the development of new supporting resources such as templates and examples. The feedback received from the test run will be incorporated in the current resources, as well as those resources to be developed and finalized in 2011, when the full FWRS system is rolled out.

- **Developing IT system support**

The FWRS IT platform features a National Society data management space and a FWRS reporting platform; and sets the basis for other online National Society data collection and reporting efforts in the IFRC. The National Society data management space which allows National Societies to enter and update data and documents has been set up, and has been tested. The FWRS reporting pages, whose development have been impacted by the delays in the web renewal project, will share the same platform as the Federation Databank and will go live in 2011.

- **Timescale of the FWRS roll-out**



Programme component 2: Building a PMER culture
Component outcome: A PMER culture is supported and nurtured.
Output 2.1 (for which funding is sought): Technical knowledge and skills, quality and coherence of PMER in the IFRC is improved.

Achievements

The progress outlined in the [mid-year report for 2010](#) in a few key areas related to this output and outcome continued during the second half of 2010.

- **Finalization, translation and dissemination of planning resource materials**

Training and resource materials focusing on project/programme planning were finalized and translated into IFRC's four working languages (and Russian). The guidance manual on project/programme planning was sent for targeted distribution to country offices and National Societies. The training materials, which also include brief materials on monitoring and evaluation were made available through FedNet and on a request basis for those wishing to run a training.

- **Development of detailed monitoring and evaluation and reporting resource materials**

Guidance materials on monitoring and evaluation materials were disseminated for review and are being used in draft form, whilst being revised. Training modules based on this guidance material have also been developed, pilot workshops held in Iceland, and zonal trainings carried out in Southern Africa and MENA (as mentioned below). The training materials will be further developed based on the revision of the guidance materials being finalized in 2011. In the meantime, draft materials serve as the basis for requested trainings on monitoring and evaluation.

- **Trainings held and people trained**

Over the year, eight trainings were held based on the core materials, with 209 people trained (141 National Society staff and 68 IFRC staff). The 209 people trained brings the cumulative total to 305 since the development of the materials. In addition, a number of other shorter or informal sessions were held around the world based on these materials (for which numbers not recorded).

- **Facilitators identified and trained**

A target of 10 "recognized" facilitators was set for 2010, in order to be able to further roll out the training. By December 2010, 22 potential facilitators had been identified, 11 of whom who have acted in a facilitation role, and an additional 11 people who would require further training experience.

Type of training	Location	Participants	
		NS	IFRC
Regional	Pacific, April	22	3
HQs	Geneva, March		17
Country	Iceland, June	29	1
Country	Pakistan, July	16	8
Country	Nepal, July	26	1
Country	Myanmar, September	16	9
Zonal	Asia Pacific, October	5	12
Regional	South Africa, November	13	13
Zonal	MENA, December	14	4
	Total	209	

However, seven of those individuals are no longer available, and changes in roles mean there is still a need to train further people in the facilitation skills required to run similar workshops. For advanced training in particular, it will also be necessary to identify other potential resource people, and for those identified, to further refine and develop their knowledge.

- **New training initiatives – emergency response related and online training**

The core training materials were also used as the basis to improve training on "plan of action" for relief and recovery operations in two different contexts – a pilot training on "Assessment and Plan of Action in Emergencies;" and the FACT (Field Assessment and Coordination Team) training, one of IFRC's core standard training for emergency response based on abbreviated versions of the core training.

Towards the end of 2010, the initial development stages of an online training on project/programme planning were completed. Initially, an online course of two modules on this topic will be completed and made available in 2011, along with two modules on the topic of monitoring and evaluation to follow.

The online forum on IFRC's new Learning Platform (www.ifrc.org/learning) keeps a register of all those who have attended the trainings so far. It allows users to have access to key resources, and a community of practitioners. However, the use of these community features has been extremely limited.

Constraints or Challenges

Only one planned workshop had to be postponed to 2011 due to competing priorities in the zone. While there are some potential resource people identified, there remains a lack of qualified facilitators in each zone who are proficient in all of IFRC's working languages, particularly, in carrying out more advanced training. The classic problem of ensuring follow up after a training also remains an issue to be further addressed. With limited PMER resources in the field, and with competing priorities in many field offices, it can be difficult to ensure follow up with participants and potential facilitators following a workshop. See below in "looking ahead" for plans to address this in 2011.

Working in partnership

One way that the need for skilled facilitation has been successfully addressed (in part) has been through working with skilled staff from National Societies to help roll out the training. So far this has been limited to four people who have co-facilitated training; further qualified and interested individuals from National Societies (as well as the secretariat) will continue to be sought to support PMER capacity-building efforts.

Contributing to longer-term impact

Both initiatives described here represent a considerable investment by PMER with high potential for longer-term impact. Training in improved project planning, monitoring evaluation and reporting skills, together with the FWRS, are key to improving the quality of the programmes delivered to people around the world, by improving the way in which they are managed.

With a substantial number of people now trained in the revised PMER methodology, and increasing all the time, momentum is slowly building for improved project management throughout the organization.

Looking ahead

In early 2011, a short assessment of training needs in the field will be carried out. Following this, a training programme targeting identified needs will be developed within the resources constraints. In addition, the training on monitoring and evaluation will be further refined and developed, and made accessible to more people. The online training course currently under development will also allow for a further reach of key capacity-building messages on PMER, and will be complemented and combined with different types of classroom training and /or distance support as required. This may include the use of webinars and other online support tools. Additional suitable facilitators will also be sought, including from National Societies, as will opportunities for those potential facilitators already identified.

As shown on page 3, FWRS key resources will be reviewed and feedback from pilot and test-run exercises incorporated. Once these resources have been translated, they will be shared with all National Societies as the system is rolled out in 2011.

<p>All Federation assistance seeks to adhere to the <u>Code of Conduct for the International Red Cross and Red Crescent Movement and Non-Governmental Organizations (NGO's) in Disaster Relief</u> and is committed to the <u>Humanitarian Charter and Minimum Standards in Disaster Response (Sphere)</u> in delivering assistance to the most vulnerable.</p>	
<p>The IFRC's vision is to:</p> <p>Inspire, encourage, facilitate and promote at all times all forms of humanitarian activities by National Societies, with a view to preventing and alleviating human suffering, and thereby contributing to the maintenance and promotion of human dignity and peace in the world.</p>	<p>The IFRC's work is guided by Strategy 2020 which puts forward three strategic aims:</p> <ol style="list-style-type: none"> 1. Save lives, protect livelihoods, and strengthen recovery from disaster and crises. 2. Enable healthy and safe living. 3. Promote social inclusion and a culture of non-violence and peace.
<p>Contact information</p>	
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