D30.1 Monitoring Checklist

Regular observation and recording of project activities is important to check the progress and to ensure that the desired outputs are being achieved. Monitoring is therefore an essential tool for the management of the planning process and should become an integral part of the community-led approach.

Monitoring the CLUES process does not require to follow complicated monitoring procedures. It is sufficient to go through the simple checklist below after each planning step, asking three main questions:

1. Where are we?
2. Where do we want to go next?
3. What do we need to do make it happen?

This situation analysis should be done in regular monitoring review meetings, for example directly after a workshop, and ideally involving all key stakeholders. Such a participatory monitoring approach enables the dissemination of information on the planning progress and problems encountered. If done in a transparent way it will also strengthen the community involvement. The focus should be on simple, open self-evaluation, appropriate to the local context. Thus, the community is empowered to initiate, review and adjust the process if necessary.

This document suggests a checklist which assists you in process monitoring and helps you to take decisions for course corrections. Make sure to record the main outcomes of the monitoring meeting in writing.
THE CLUES MONITORING CHECKLIST

1. Where are we?
   - What have we achieved?
   - Does it correspond to our main goals?
   - Were all main outputs achieved? If not, why?
   - Are the main outputs documented and disseminated? Are all relevant stakeholders informed?
   - What have we learned from the process so far? Are our assumptions still valid?
   - Is stakeholder involvement sufficient? Have all stakeholders reliably assumed their responsibilities?
   - What are strengths, weaknesses, opportunities and threats?

2. Where do we want to go next?
   - Are there any disabling factors, bottlenecks or conflicts which could hinder progress?
     ❍ Part 2 (p.49) of the CLUES guidelines explains how to analyse and develop the six elements of an enabling environment.
   - What are upcoming milestones?
   - Is our time frame realistic?
   - Are next steps clearly defined?
   - Are our goals SMART (Specific, Measurable, Attainable, Relevant, Time-bound)?

3. What do we need to do to make it happen?
   - What still needs to be done before moving to the next step of the process?
   - How can disabling factors be addressed in order to bring about an enabling environment?
   - Is there a need to involve further stakeholders for the next step?
   - Do we need to improve communication with project stakeholders not involved on a daily/weekly basis?
   - Are there any special events or meetings to be organised beforehand?
   - Are human and financial resources secured for moving ahead?
   - Are responsibilities clearly defined?

Did we forget anything? Feel free to add further questions to this checklist!