

O-303

IMACON[®] Project Appraisal and Monitoring Tool: approach and field experience

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Presentation outline

- Challenges of development cooperation – why do we need such a tool?
- Principles and methodology – how does it work?
 - ▣ Assessment
 - ▣ Visualization
 - ▣ Interpretation and conclusion
- Testing, experience and Case study.



Good
performance?



Public
acceptance?



Successful
fundraising?



Achieved
goals?

Chance to
improve the
world?

**PROJECT
REPORT
2013**

Excellent
reporting?



Budget for
administrative
costs?

Place in
history?

What is good project? Successful project?

Challenges of Development cooperation in countries in transition.

- Donor's and actor's vision of the same project often varies greatly
- High degree of financial dependence on external support, lack of local
- Outcomes and impacts are often unpredictable and useless
- Projects design and their implementation practice in countries in transition have another type of value: process over result

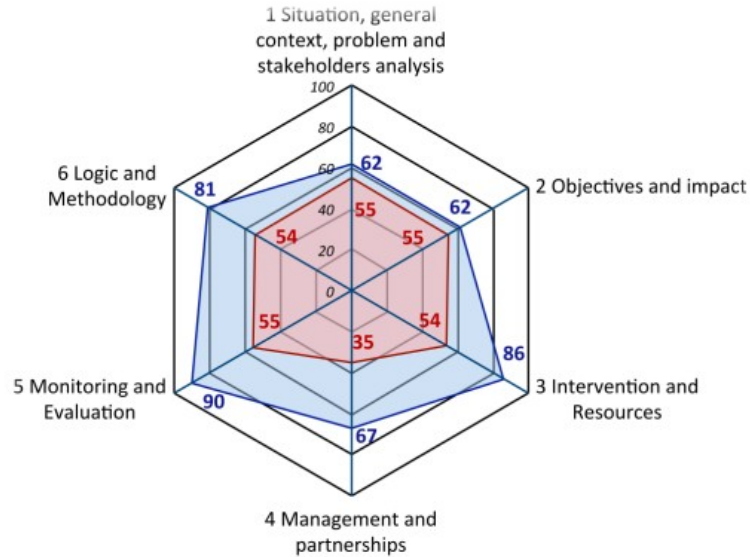
Constraints of the PME system

- Low quality of development of project application / management and monitoring – indicator of constraints in the PME system
- These constraints should be identified and overcome
- Upgrading project Appraisal & Monitoring system to make it able to identify and overcome the constraints, using project resources and project management
- IMACON[®] Project Appraisal and Monitoring Tool developed for this purpose

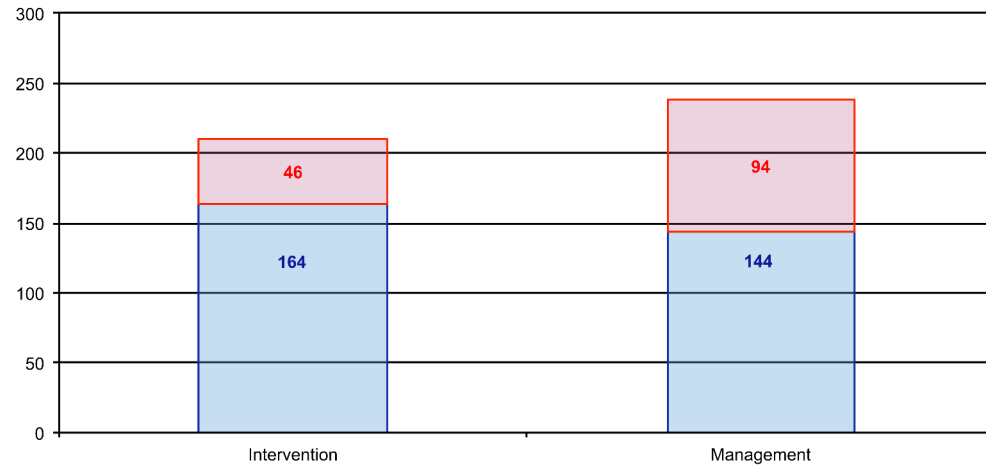
Principles of IMACON[®] Tool

- Principle of quantitative assessment of 24 parameters (combined in 6 metrics) based on qualitative research methods
- The range of estimates - the actual score and the value of the estimation error
- Pre-assumption that “perfect” project is the one which pays enough attention to all parameters and balances them well
- Two main pictures as a result of assessment - project balance as a whole and in the context of the link “intervention vs management”

Visualization format



■ Total score (to) ■ Total score (from)



What we measure?

□ Intervention system (1-3)

- ▣ What, Why, For whom and For what we act?
- ▣ Who is affected and in which way?
- ▣ Outputs, Outcomes and impact.

□ Management system (4-6)

- ▣ Organization, governance and management
- ▣ Adaptive and knowledge management
- ▣ Systematic and value based approach.

What are the 6 parameters?

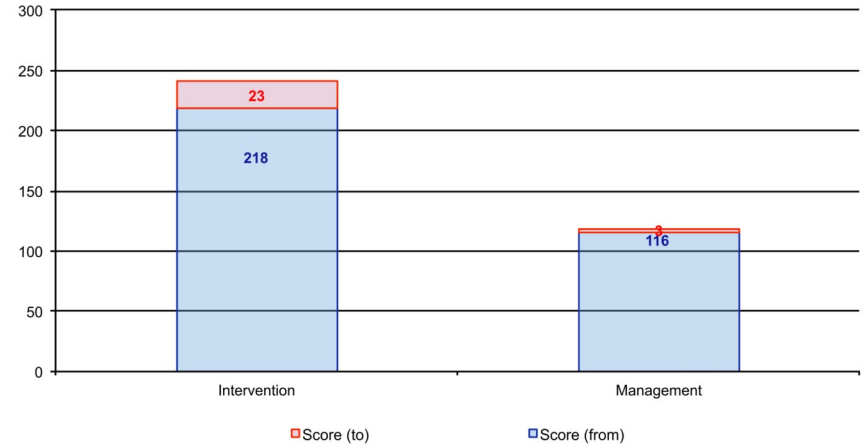
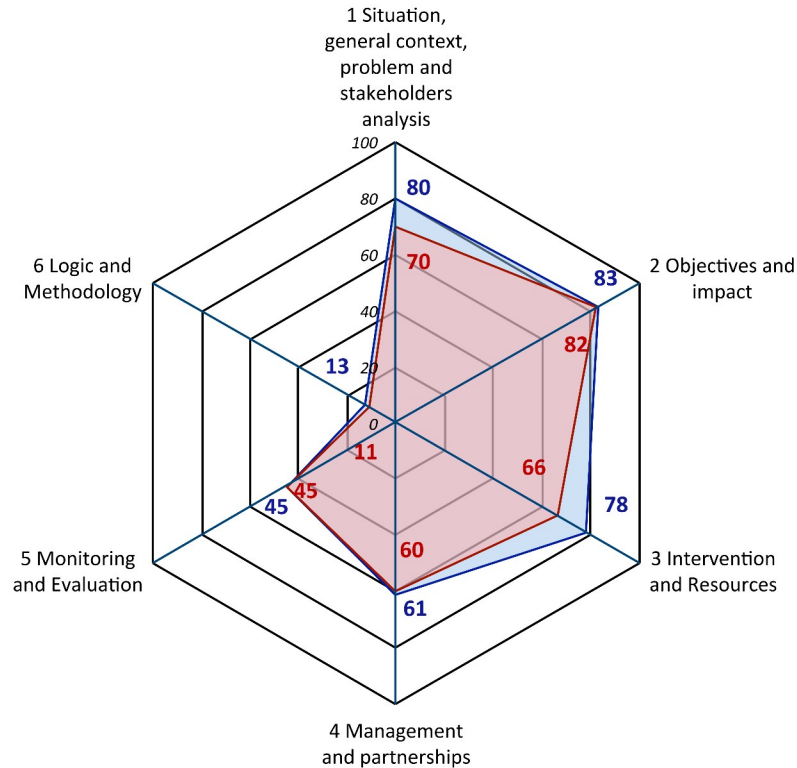
1. Situation, context, stakeholders, problems, target groups and beneficiaries
2. Goals and expected changes, performance, outputs, outcomes, assumptions, preconditions, risks
3. Activities and resources, planning, division of responsibilities between the performers

What are the 6 parameters?

(continued)

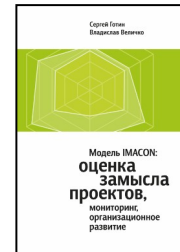
- 4. Management and partnerships, implementer(s), its (their) competences, capacity, relationships with partners and other stakeholders
- 4. Monitoring and evaluation, including indicators and verification procedures, subjects and objects of M&E
- 4. Logic and methodology, hypotheses, strategies, principles, models and their rationale, core values and their promotion.

How we conclude assessment?



Testing of the IMACON[®] tool

- More than 400 projects (within a number of programs in 2011-2014)
- Financial scale of the projects – from 7-15 thousand to 5-15 million EURO
- Implemented in Belarus, Russia, Ukraine, Moldova
- Funded by EU, SIDA, USAID, Gov-t of Germany, Gov-t of Russia
- Published in Lithuania in Russian language.
- English version coming soon:
please visit www.imacon.org web site:



Key benefits (client's feedback)

- Helps to identify bottlenecks of the project concept
- Provides clear and transparent feed-back for the project holder
- Provides clear task for management and monitoring expert
- Allows easy visual comparison of the projects
- Supports the decision-making process for final project selection
- Evaluation data, collected by different experts is suitable for generalization.

Key benefits (continued)

- Suitable for project self-assessment
- Covers “cross-cutting” issues, including gender and HR based approach
- IMACON[®] tool helps to decrease the role of quantitative indicators (criticized very much by the development/transformation thinkers very much)
- Making projects/program more focused at cross-cutting issues as well as at institutional development. Supporting the process of change management.

Case study - framework

- Portfolio of 12 projects, implemented by sub-grantees in Belarus
- Financial scale – around 10 000 euro (plus own in-kind contribution)
- IMACON[®] tool used on appraisal and final evaluation stages

Case study – main conclusions

- 8 of 12 projects focused their management efforts at action/indicators level only
- M&E system of sub-grantees covered only technical level (timing/budgeting) and were not operating well
- Sub-granting monitoring and reporting system was not focused at reflection at outcomes level
- Recommendations made by the experts, given at appraisal phase were mostly ignored by the donor's managers and M&E specialists because of lack of specific procedures
- Projects, focused at specific approaches (like “advocacy as an asset of the project”), ignored it in the reports.

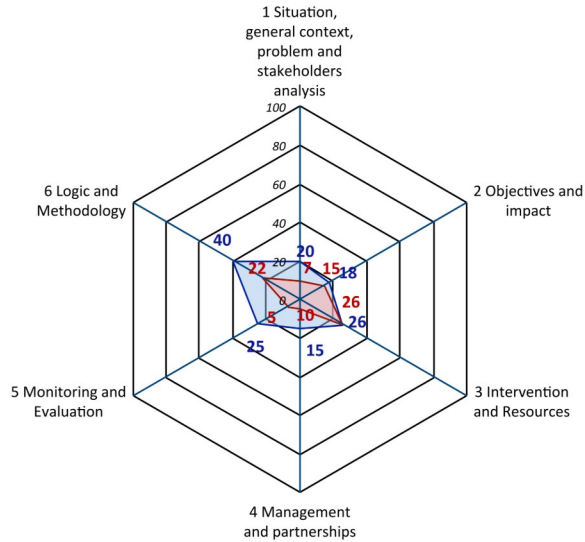
Conclusion

- IMACON[®] project appraisal and monitoring tool is a versatile instrument that can be used in a variety of management situations
 - ▣ Project appraisal/ex-ante evaluation/base-line assessment
 - ▣ Strategic monitoring/mid-term evaluation of the project portfolio
 - ▣ Ex-post evaluation
 - ▣ Self-evaluation
 - ▣ Support to decision making process
- IMACON[®] tool allows identifying constraints of specific PME system and improve effectiveness, efficiency, sustainability and relevance of the program/intervention.

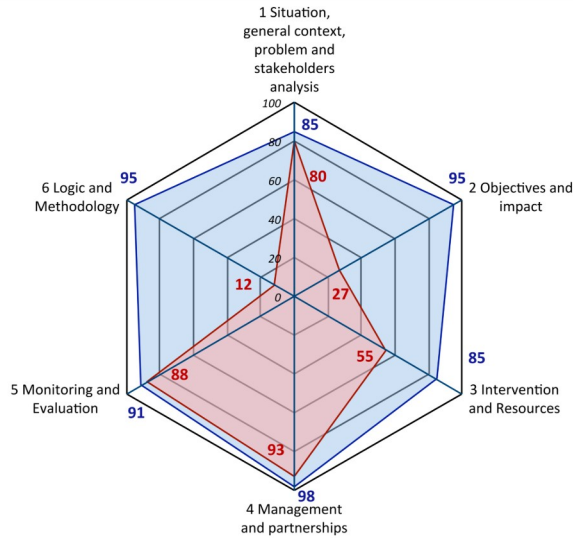
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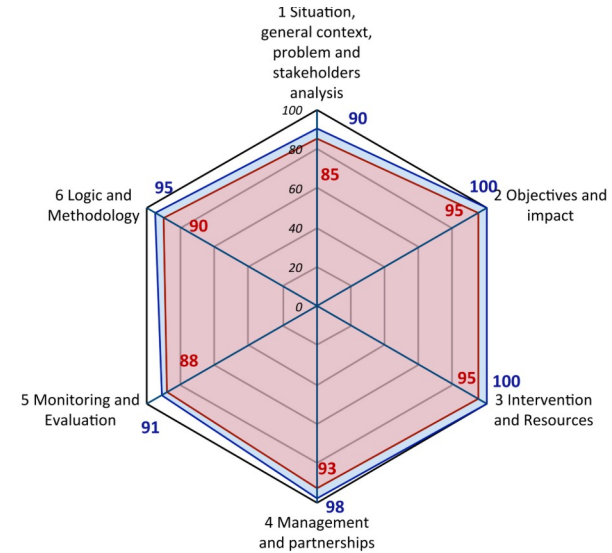
Project monitoring progress



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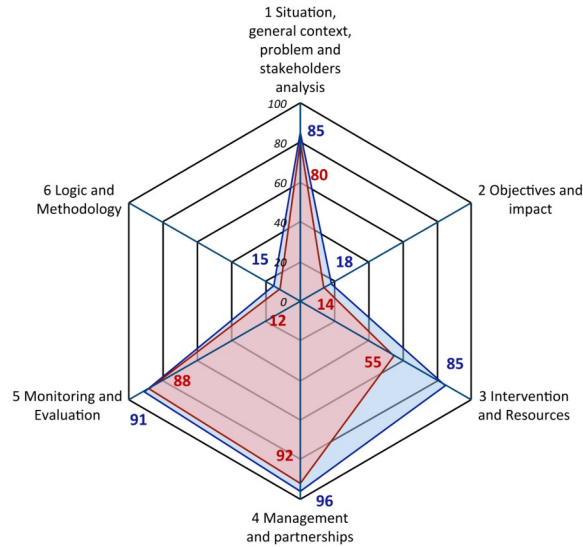


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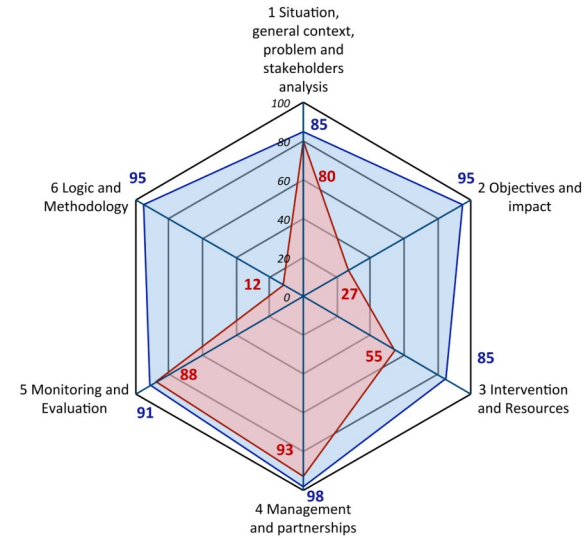


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Visualization of variation issue



■ Total score (to) ■ Total score (from)



■ Total score (to) ■ Total score (from)

Intervention vs Management

