

**gesci**  
Founded by UN ICT Task Force



**GESCI**

**OPERATIONAL MANAGEMENT OF PARTNERS (M&E) GUIDELINES**

**Revised 2022**

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## 1. Purpose of the Guidelines

These guidelines outline the principles, processes, and tools for operational management of partners in donor-funded programmes. They aim to ensure accountability, effectiveness, and learning in implementation while supporting local ownership and capacity strengthening.

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## 2. Guiding Principles

1. **Partnership & Local Ownership** – Partners are treated as equal stakeholders, with mutual accountability.
  2. **Transparency** – Clear reporting, communication, and decision-making processes.
  3. **Adaptiveness** – Use evidence and feedback to adjust programming in real time.
  4. **Do No Harm & Conflict Sensitivity** – Respect local dynamics, avoid exacerbating tensions.
  5. **Alignment with Donor Compliance** – Adhere to donor contractual, financial, and reporting requirements.
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## 3. Roles & Responsibilities

- **Donor/INGO (Primary Recipient)**
    - Provide funding, oversight, and technical support.
    - Develop standard M&E frameworks, tools, and reporting templates.
    - Consolidate reporting and share learning with donors and stakeholders.
  - **Local Partners (Sub-Recipients/CSOs)**
    - Implement activities and collect data at the community level.
    - Use agreed-upon M&E tools and submit reports on time.
    - Participate in learning and knowledge-sharing activities.
  - **Learning/Monitoring Partners (where applicable)**
    - Conduct independent field monitoring, especially in hard-to-reach areas.
    - Provide objective verification of results and risks.
    - Facilitate reflection and adaptive learning.
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## 4. Monitoring & Evaluation Framework

- **Results Framework:** Align with donor-approved logframe, including clear indicators (outputs, outcomes, impact).
  - **Data Collection:**
    - Routine partner reporting (monthly/quarterly).
    - Independent in-situ monitoring visits (at least quarterly for priority areas).
    - Remote monitoring tools (SMS, WhatsApp, call-ins, digital surveys).
  - **Verification:** Triangulate partner reports with site visits, beneficiary interviews, and third-party monitoring.
  - **Evaluation:** Mid-term and final evaluations to assess outcomes, sustainability, and lessons learned.
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## 5. Reporting & Learning

- **Reporting Schedule:**
    - Partners → INGO: Monthly financial & activity reports, quarterly narrative reports.
    - INGO → Donor: Semi-annual or annual consolidated reports.
  - **Learning & Knowledge Sharing:**
    - Communities of Practice (annual or biannual gatherings).
    - Documentation of lessons learned and best practices.
    - Dissemination of findings to partners, donors, and communities.
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## 6. Compliance & Risk Management

- **Financial Oversight:** Standard budgeting templates, regular audits, spot checks.
  - **Risk Monitoring:** Identify security, operational, reputational, and fiduciary risks.
  - **Safeguarding & Accountability:** Mechanisms for reporting misconduct, fraud, or safeguarding issues.
  - **Contingency Planning:** Alternative delivery and monitoring methods for insecure areas.
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## 7. Capacity Strengthening of Partners

- Initial capacity assessments (organizational, financial, M&E systems).
- Tailored training on donor compliance, financial management, and M&E.
- Ongoing mentorship and joint review meetings.

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## **8. Feedback & Adaptive Management**

- Establish two-way feedback channels (partners ↔ communities ↔ INGO).
  - Use findings from monitoring and needs assessments to adjust programming.
  - Document adaptive decisions for accountability and donor reporting.
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## **9. Tools & Annexes**

- Standardized partner reporting templates (activity, financial, indicator tracking).
- Site visit checklist.
- Remote monitoring protocol.
- Rapid Needs Assessment tool.
- Risk matrix and mitigation plan.