

ORGANISATIONAL PLANNING, MONITORING AND EVALUATION

Planning

1. GL's annual Board Meeting and Strategic Planning coincide with the association's financial year that runs from 1 March to 28 February of each year. The annual Board meeting takes place in late March each year. Among its functions are to review and adopt the annual, audited financial statements; review current programme work and/or devise a strategy for the upcoming period. The Board and staff members are involved in strategic planning.
2. Starting in 2007, GL shifted from a two to a three year rolling strategic plan. The intention is to move to a five year strategic planning framework from 2010.
3. All proposals to donors are based on the strategic plan. GL strives at all times to ensure that it retains strategic control and direction of its work. This is especially significant as the majority of funding agencies move away from core support towards more project-related support.
4. The annual work plan is based on the strategic plan and on specific agreements reached with funding agencies. These are worked into one standardised log frame that includes detailed activities, timeframes, output and outcome indicators as well as means of verification (MOV's).
5. The annual action plan cascades into more detailed quarterly plans. A template for the annual and trimester plan is found in the Compendium of forms as **Form M&E01 and M&E02**.
6. The annual work plan and trimester plans inform individual remuneration-linked Performance Management Agreements including the output and outcome indicators for each member of staff. This is explained in the Human Resources section.
7. A weekly planer (**Form M&E03: Weekly Planner**) is used for weekly planning.
8. A workshop event/checklist (**Form WS01: Workshop checklist form**) is used to organise major cross cutting events.

Reporting

9. There are a number of different ways and levels at which reporting takes place. These include:
 - The monthly report and bimonthly planner as detailed above.
 - The CEO is responsible for ensuring that programme managers and the finance department prepare reports to donors as required.
 - The CEO and DFC prepare quarterly financial statements for review and approval by the EC and annual financial statements for review and approval by the Board.
 - The CEO coordinates the production and dissemination of the annual report.

M&E management tools

10. A full set of tools and reporting formats is found in the GL Planning, Monitoring and Evaluation is provided in the M and Manual which should be read in tandem with this section of GL Policies and Regulations.
11. Monitoring of programme implementation takes place in the following ways:
 - Unit meetings take place weekly and weekly planners are submitted to the CEO every Friday for the following week.
 - Programme and systems reports are produced and analysed by management monthly.
 - Feedback is given by managers at the monthly management meetings.
 - Individual staff performance evaluations take place three times a year in line with the Performance Management System (PMS).
 - Monthly financial reports that are presented by the DFC and reviewed at monthly management meetings.
 - GL obtains feedback from participants at every workshop or event conducted. This is summarised and included in every workshop report.
 - GL, through its departments and units, conducts internal reviews of all its major projects.
 - Donors regularly visit GL and make their own assessments of projects they are supporting.
12. Programme outputs are monitored and evaluated in the following ways:
 - Each programme has deliverables and output indicators.
 - These are monitored three times a year during programme reviews and planning.
 - Output indicators are quantified at the end of each year in the report to the Board and the annual report. These inform the annual and five year plans.
13. Knowledge products that result from programme work are monitored in monthly reports to the CEO and annual reports to the Board according to overall numbers, region and theme. These cover:
 - Library books and journals acquired.
 - Research uploaded to the GMDC data base.
 - Photo and audio visual library.

Outreach indicators

14. GL's outreach is measured through monthly reports (see list of reports in the M and E manual) to the CEO who compiles this data as annual reports to the Board in the following areas:
 - Gender disaggregated statistics on workshops.
 - Website statistics covering number of hits; most accessed pages; country and region of origin; comments and feedback on the website. In the case of cyber dialogues these are summarised and posted on the website.
 - Publication reports on materials produced and their dissemination.
 - Media statistics and examples of media coverage.
 - Statistics from the Opinion and Commentary Service on number of articles written, authors by sex and region; number of new writers; number of times articles are used by the mainstream media and in other ways, for example research.
 - Contacts data base and list serve statistics disaggregated by sex, region and areas of interest.
 - Invitations received and honoured and an analysis of the event form that all staff fill out after they have represented the organisation anywhere. This stipulates the

nature of the event and GL's input; the outputs and outcomes; follow up and opportunities identified.

- Reports on debates conducted through the GMDC and feedback received as a result of this.
- Analysis of research queries received and acted on through the GMDC.

Process indicators

15. Process indicators include:

- Feedback received
- Comments from Annual Report
- Reflective books and reports developed with partners following major undertakings.

Outcome indicators

16. GL constantly monitors whether its programme work and that of its partners is resulting in the desired changes through:

- Conducting audits and baseline studies such as the Gender and Media Baseline Study; the Gender Violence Indicators Project; and the two seminal studies conducted by GL on gender and governance (Ringing up the Changes and At the Coalface).
- Monitoring implementation of these plans; conducting lobbying and advocacy around them.
- Regular media monitoring, especially around themes
- Conducting follow up audits and studies to determine if there has been change.
- Gathering case studies and conducting focus groups that provide insight into the quantitative data.
- Articles written for the biannual Gender, Media and Diversity Journal.
- Academic papers presented at GL events and others to which GL is invited.
- Personal accounts and testimonies of beneficiaries in follow up research, for example in the case of those who participate in the "I" Stories or write for the Commentary Service; those who participate in GL training including on-the-job training like interns.

Communicating results

17. The results are communicated through:

- Colourful and accessible research reports.
- Fact sheets and press releases designed for the media.
- Interactive workshops, wikis, debates, cyber dialogues around key research and issues.
- Knowledge and lessons learned publications produced after major projects such as the book "Business Unusual: Gender Economy and the Media" with a foreword by Ellen Johnson Sirleaf; "Mapping a new course" on Gender, HIV and AIDS policies in newsrooms; and "Roadmap to Equality" on the Southern African Gender Protocol Alliance campaign for the adoption of this critical regional instrument.
- Producing of documentaries such as "Making every voice count" on the Gender and Media Baseline Study; "Road map to equality" on the SADC Protocol on Gender and development and "At the Coalface: Gender and Governance" in Southern Africa.

Institutional indicators

18. GL regularly monitors its institutional health in the following ways:
- Due diligence conducted by donors before funding agreements are made or funds released.
 - The annual financial audit; feedback received through the management letter and how this is incorporated into financial planning and policy.
 - An institutional barometer that GL has compiled based on several of these assessments and administers internally after every Board and strategic planning session as a means of self assessment (see **Annex G**).
 - SWOT exercises conducted after each major project as well as annually
 - Annual questionnaires to partners and internal assessment of partnerships following recommendations made in the first five year evaluation. This form is also found online.
 - Annual team assessment using the Blake and Mouton questionnaire.
 - Compilation of awards and other measures of distinction at individual and organisational level.

External evaluations

19. Key features of the five yearly external evaluation include:
- The contribution of several donors who have an interest in GL's work to a comprehensive external review that covers the work of the organisation and the institutional infrastructure that supports it. The coordination of donors in conducting one overall institutional audit is itself an important institutional indicator for GL.
 - The evaluators (at least two) are independent and have no direct interest in the organisation.
 - The evaluation takes place over several months giving the evaluators the opportunity to observe GL's work, its methods and linkages over a period of time and in a variety of settings.
 - The evaluation is participatory and engages with the Board, Staff and Stakeholders at key points to debate drafts and findings so that the findings are internalised, owned and acted upon by the organisation.
 - The final report is presented to donors, stakeholders, staff and the Board.
 - The recommendations are incorporated into strategy and planning.

