FINAL REPORT ON CAPACITY BUILDING IN MONITORING AND EVALUATION FOR THE NAMIBIAN SOCIAL SECURITY COMMISSION'S DEVELOPMENT FUND

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The Health Finance and Governance Project
USAID's Health Finance and Governance (HFG) project will help to improve health in developing countries by expanding people's access to health care. Led by Abt Associates, the project team will work with partner countries to increase their domestic resources for health, manage those precious resources more effectively, and make wise purchasing decisions. As a result, this five-year, $209 million global project will increase the use of both primary and priority health services, including HIV/AIDS, tuberculosis, malaria, and reproductive health services. Designed to fundamentally strengthen health systems, HFG will support countries as they navigate the economic transitions needed to achieve universal health care.

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CONTENTS

ACRONYMS

DEC	Data Entry Clerk
DQA	Data Quality Assurance
M&E	Monitoring and Evaluation
MSD	Maternity, Sick and Death Benefits Fund
PPT	PowerPoint Presentation
SLA	Service Level Agreement
SSC	Social Security Commission
SSC-DF	Social Security Commission's Development Fund
USAID	United States Agency for International Development

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In preparing this report, the Health Finance and Governance team sincerely thanks the USAID/Namibia Mission for the warm welcome and generous support provided. Support from the Mission Director, Ms. Elzadia Washington-Danaux, the Health Officer, Ms. Melissa Jones, and Project Officer Mr. Matt Rosenthal, provided an enabling environment for our work.

EXECUTIVE SUMMARY

The Republic of Namibia has gained significant notice within the development community in recent years as it grapples with the transition to the group of upper middle income economies, as defined by the World Bank. In spite of this classification, Namibia continues to have the largest income inequality in the world measured by Gini coefficients (0.74) and an unemployment rate estimated at between 37% and 51% of the general population. Against these challenges, the Namibian Social Security Commission manages a set of funds intended to *"provide a foundation of social protection on the principles of solidarity for workers in Namibia and their dependents."*

The Social Security Commission's Development Fund, which began distributing educational funds in 2009, seeks to help unemployed Namibians from socio-economically disadvantaged backgrounds. The Development Fund supports disadvantaged students with bursaries for educational pursuits and through grants to organizations that provide training and employment opportunities to unemployed Namibians. As with any organization working to promote positive changes across society, a key activity for the Development Fund is monitoring and measuring the impact of its work. To this end, the USAID/Namibia Mission funded the efforts of a Monitoring and Evaluation Technical Advisor from the Health Finance and Governance project to work in close collaboration with the Development Fund for three months to develop a formal monitoring and evaluation framework, build the technical capacity of Development Staff in monitoring and evaluation and begin rolling out the monitoring and evaluation program in an effort to catch up to bursaries and grants already being distributed by the Development Fund.

The intensive technical assistance resulted in the development of the following components:

- A *detailed matrix of indicators* was developed that will measure the long-term impact of bursaries and grants dispersed by the Development Fund. Prior to this assignment, there were no mandated reporting indicators that the Development Fund was required to report on. The M&E Technical Advisor worked in partnership with the Development Fund M&E Officer to compile both process and outcome indicators. The process indicators focus on the operational effectiveness of the Development Fund in carrying out its mission. The outcome indicators focus on the benefits accruing to the beneficiaries of Development Fund grants and program support. Both sets of indicators will be compiled in the Development Fund Annual Report for stakeholders.
- A structured *monitoring and evaluation plan* was developed based on the indicators described above to serve as a guide for the Development Fund staff in carrying out their mandate. The monitoring and evaluation plan provides a description of the lens through which the Development Fund activities will be evaluated, describes the sources of data for carrying out the monitoring activities, defines the roles of both Development Fund staff and support recipients in compiling the requisite data and outlines the timelines under which these activities will take place.
- An original set of paper forms for applying for grants and bursaries by Namibians was in place at the beginning of the M&E assignment. During the course of the M&E assignment a *revised set of data collection tools* were made more detailed in order to ensure that the most granular level of information was obtained (e.g., disaggregation by age, gender and region in which they live) to allow for appropriate monitoring and evaluation. Grantee reporting templates were updated and recommendations were made for improving the Development Fund's tracking database.

- A *set of capacity building training materials* for the Development Fund was developed during this assignment. As a way of institutionalizing the monitoring and evaluation activities and building the capacity of Regional Compliance Officers at the SSC, the M&E Technical Advisor and M&E Officer undertook a three-week long training mission in which 34 project managers and accountants in four regions were trained to complete the quarterly reports. A fifth training was undertaken by the SSC staff after the assignment was completed.

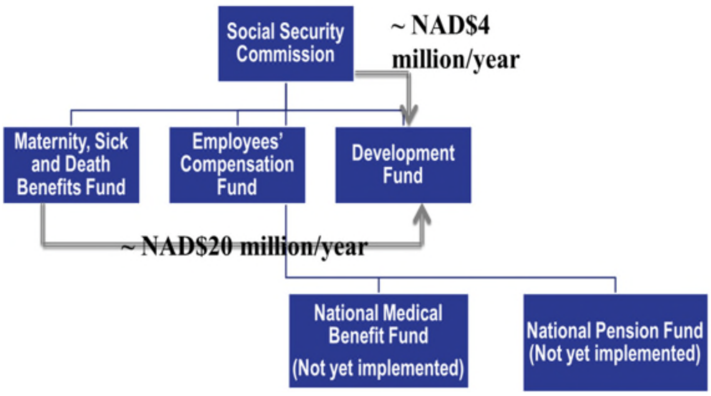
Much progress was made in strengthening the monitoring and evaluation capacity of the Development Fund during the three months of intensive technical assistance. There remain, however, a number of areas that will continue to warrant attention:

- There is a need for additional Development Fund staff members to support the monitoring and evaluation work, particularly with regard to capture and recording of grantee data.
- The Development Fund would greatly benefit from the introduction of an electronic data management system (in conjunction with other SSC units) in order to introduce structured data capture and streamline redundant processes currently being done by hand.
- A longitudinal study to track the recipients of Development Fund bursaries and grants at routine intervals after completion of their program participation would likely add key information to the attempts to monitor the impact of Development Fund programs.
- The DF should return to the M&E plan and review it periodically to ensure that it continues to meet their needs. The M&E officer has the materials and experience required to modify any part of the plan including how to direct changes to the database to meet data reporting needs.

The remainder of this report provides additional detail on the activities implemented under the technical assistance provided during the three-month period of May through July 2013 by an M&E Technical Advisor working under the Health Finance and Governance Project.

1. INTRODUCTION

The Social Security Commission of the Republic of Namibia was created by the Social Security Act of 1994, with its primary objective to manage three funds intended to provide social protection to the most vulnerable population in the country. The three funds are the Maternity, Sick and Death Benefits Fund (MSD), the Employees' Compensation Fund and the Development Fund. Two additional funds, the National Medical Benefits Fund and the National Pension Fund, have been evaluated and proposed as additional resource mechanisms, but they have not yet been implemented. The Social Security Commission (SSC) is funded through a combination of budget allocations (from the Department of Labor) and through tax revenue, in particular taxes on employee earnings and assessments paid by employers. The Development Fund manages approximately NAD$38 million annually, which comes from an allocation from the Department of Labor (through the SSC) and from a transfer of the 'free funds' (over reserves) from the MSD equivalent to approximately NAD$20 million per year. As a division within the SSC, the Development Fund relies upon the SSC to cover administrative costs and operational resources. The SSC's Board of Commissioners has mandated that the Development Fund maintain a minimum reserve balance of NAD$100 million. The following graphic provides an overview of the structure of the funds managed by the Social Security Commission, highlighting the mechanisms by which the Development Fund is resourced:



The Development Fund provides support to vulnerable populations by distributing:

- Bursaries: grants to unemployed, disadvantaged citizens for technical and academic training
- Study loans: low interest loans to unemployed, disadvantaged students to pursue undergraduate degrees
- Employment schemes: grants and loans targeting organizations managing job creation programs for unemployed and disadvantaged populations, and
- Training programs: grants to training organizations managing programs targeting the unemployed

and disadvantaged populations.

The Development Fund has been funding bursaries since 2011, student loans since 2012 and began selecting organizations that are implementing training and employment schemes for awards in May 2013. The Development Fund is responsible for identifying and selecting beneficiaries of funding, monitoring the use of funds and operating with financial responsibility to sustain the fund. With growing pressure from the Government of the Republic of Namibia to expedite operations, disburse funds and demonstrate value, the Development Fund initiated its activities without a full-fledged monitoring and evaluation plan in place. In addition, the Development Fund is operating with only three full-time staff members: the Development Fund Manager, the Employment Officer and the M&E Officer. These three full-time staff members are supported on a part-time basis by clerical staff which is shared across other SSC programs.

In order to fill the M&E resource gaps, the Development Fund requested support from the USAID/Namibia Mission in the form of a full-time Monitoring and Evaluation Technical Advisor to be seconded to the Development Fund in Windhoek, Namibia for a period of three months. The USAID-funded Health Finance and Governance Project (HFG) provided the requested technical advisor to the Development Fund for the period of May to July 2013. The following report provides the summary of technical assistance provided by the HFG project, including detailed findings and recommendations going forward.

2. TECHNICAL ASSISTANCE OBJECTIVES AND ACTIVITIES

The objectives of HFG's technical assistance to the Social Security Commission's Development Fund were to develop a monitoring and evaluation (M&E) plan, build general monitoring and evaluation technical capacity for the Development Fund's project team, and to ensure that the appropriate tools to implement the M&E plan were in place and relevant to their goals. The Development Fund's M&E Plan will be used to document the value for money of the programs being implemented and to inform future programming by the SSC.

In order to most expeditiously provide the technical assistance requested, an M&E Technical Advisor was seconded to the SSC Development Fund in Windhoek on a full-time basis from the beginning of May 2013 through the end of July 2013. The M&E Technical Advisor was assigned a desk to work from on a daily basis within the SSC offices and functioned as an embedded member of Development Team during the assignment. The M&E Advisor had access to all Development Fund background documents, grants and bursaries files, conducted site visits to grantees with the Development Fund team members and attended all regular and ad-hoc team meetings. For the duration of the assignment, the M&E Technical Advisor provided one-on-one mentoring to the Development Fund staff charged with overseeing the M&E activities and co-developed with them many of the M&E Plan components discussed in detail below. A copy of the jointly developed technical assistance work plan is provided in Annex A.

2.1 Initial Assessment of the Development Fund M&E Capacity

At the initiation of the technical assistance assignment, the M&E Technical Advisor utilized an assessment to understand the environment into which and for which the plan would be designed. The findings of the initial assessment guided the creation of the technical assistance work plan and documented the Development Fund's M&E capacity baseline.

The Development Fund staff is comprised of a Manager responsible for the overall operations and oversight of all activities and reporting to the Executive Director of the SSC; an Employment Officer responsible for managing the Development Fund's employment and training schemes; and an individual playing the dual roles of Education Officer overseeing the education scheme beneficiaries and M&E Officer implementing the M&E activities. As noted above, there are also part-time administrative assistant and data entry clerks employed by the Development Fund. The Development Fund Manager indicated that they intend to hire for two additional positions: a Senior M&E Officer and an individual to take on the Education Officer role, which would allow the current Education Officer to solely focus on M&E related activities for the Development Fund. Roles and responsibilities were clearly established among the team. Although very strong in managerial experience, the Development Fund team lacks any formal training in the areas of M&E.

The M&E Technical Advisor and the M&E officer of the Development Fund worked closely together in the development of the M&E Plan over the course of the assignment setting aside approximately four to six hours per day for this effort. This approach allowed for a close mentoring dynamic and to ensure that all elements of the M&E Plan were clearly explained to and understood by the M&E Officer. The other members of the Development Fund team were available as needed to support the work of the M&E Technical Advisor and the M&E Officer, either by e-mail or through in-person meetings. Baseline knowledge of Development Fund operations was further enhanced for the M&E Technical Advisor through participation in site visits with the Development Fund team to current grants and bursaries recipients.

The Development Fund team and SSC management had discussed the idea of using Compliance Officers from the SSC Operations department (who are based at the regional level) to support the M&E Officer in the evaluation and verification of project reports. Compliance Officers' primary occupation currently is to help the SSC register all legal employees and ensure that they are paying what they should be into social security (i.e., generating revenue for the funds). These Compliance Officers are pressed for time in their current roles but consideration is still being given to utilizing them in a limited capacity to support Development Fund activities.

Data Entry Clerks are hired on a temporary basis by the Development Fund and are not formally trained beyond using the database software for basic data entry. During the initial assessment, the Development Fund staff complained of many mistakes being entered into the database and many incidences of duplicated entries; the Development Fund staff specifically requested assistance from the M&E Technical Advisor in developing a system of internal oversight in the M&E plan to avoid these problems in the future. Additionally, the Development Fund staff noted that the Date Entry Clerks all use the same login ID for the database making it impossible to know which one entered data incorrectly. This issue and the contents of the database will be more thoroughly reviewed in the Structuring Data Collection Tools and Templates discussion below.

2.2 Activity 1: Development of the M&E Framework and Plan

The first task taken on by the M&E Technical Advisor upon arriving at the Development Fund in May 2013 was to review the initial scope of work with the Development Fund team to jointly establish the priorities and a work plan for the duration of the assignment. The jointly agreed upon primary goal of the technical assistance was creating an M&E plan, with all its necessary components, in order to produce a final, annual report that the Development Fund would distribute to its stakeholders. The Development Fund Annual Report was defined to the M&E Technical Advisor as being a summary of what had been accomplished by the Development Fund in the previous year towards its primary objectives, namely improving the skillsets of the socially and economically disadvantaged work force, and ultimately, reducing unemployment. The SSC did not provide the Development Fund with specific indicators on which they were required to report; this dynamic provided an opportunity for the M&E Technical Advisor and the Development Fund team created a results framework and theory of change to systematically construct an indicator matrix that would fulfill their broad reporting obligations while also effectively monitoring the progress of grantees.

The M&E Technical Advisor and M&E Officer agreed during the initial phases of work that the Development Fund needed to develop indicators on two levels: Development Fund operations and progress (i.e., process indicators) as well as on the progress and success of the beneficiaries receiving support from the Development Fund (i.e., outcome indicators). To determine what indicators should be used to measure these components, the M&E Technical Advisor and the M&E Officer referenced the Development Fund Policy and the Development Fund Strategic Business Plan (2013-2018) for guidance. In addition, based on a desire to minimize the reporting burden on bursary and grant recipients and considering their low-level of skills in this domain, the M&E team utilized the current format for required quarterly reports as a guide to what data could be reasonably be reported and tracked for the M&E plan.

In reviewing the criteria for defining indicators for the M&E Plan, the Technical Advisor and the M&E Officer utilized the following questions to further structure their review:

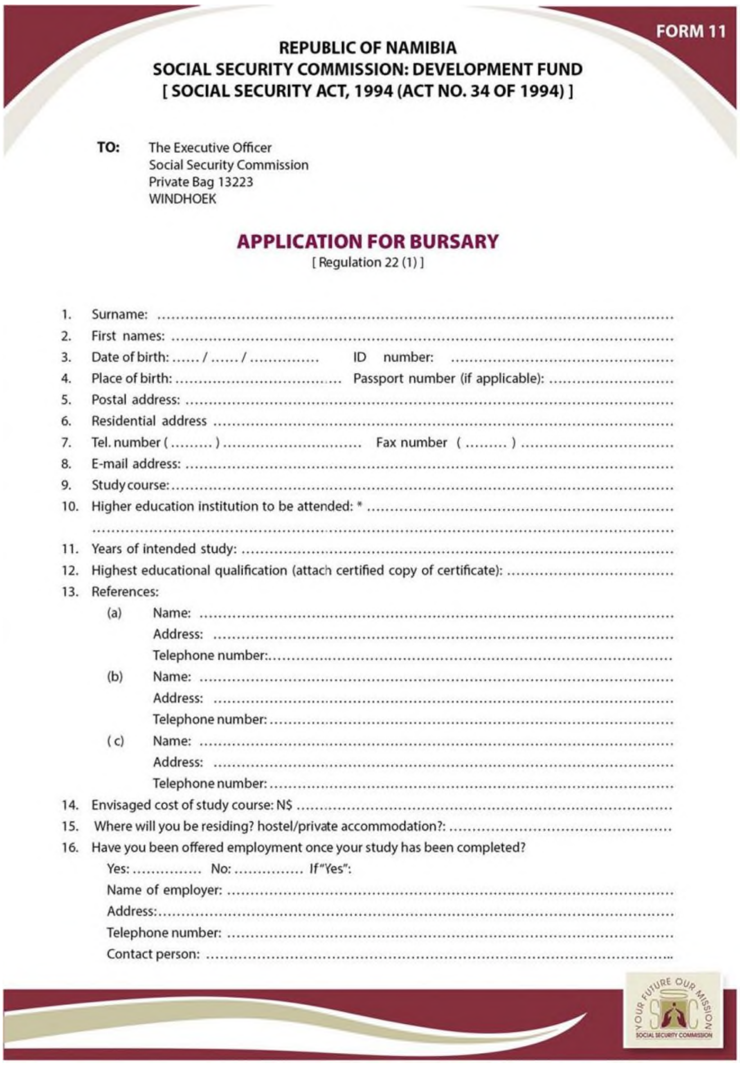
- What will be **evaluated**?

    - Development Fund funded training and employment schemes
- What **criteria** will be used to judge program performance?
    - The number of individuals trained or employed compared to its stated goals
    - The adherence to project milestones reported in the project work plan
    - The accuracy of finance reporting measured by the existence of receipts to account for expenses
    - The adherence to financial milestones as reported in the project advance request forms
- What **standards of performance** on the criteria must be reached for the program to be considered successful?
    - 100% of all project managers or accountants (at least one or the other for 100% of projects) have been trained to accurately complete the Quarterly Reports
    - 100% of individuals reported trained or employed are accounted for
    - The project is on schedule and all necessary activities have been successfully undertaken
        - If activities are delayed, what is the plan for catching up or is there an alternative activity being taken (and has it been approved by the Project Officer?
    - 100% of all expenses have corresponding receipts
    - The project is roughly on schedule regarding its projected and actual expenditures
- What **evidence** will indicate performance on the criteria relative to the standards?
    - Participant registry for M&E trainings for the Project Managers and Accountants
    - Interviews with all individuals on the participant registry that are reported to have been trained/employed
    - Review of work plan with project management and a site visit to ensure that the status of all activities have been reported accurately
        - All outstanding activities have been noted and an action plan to catch up has been signed by the Project Manager
    - Receipts and bank statements attached to the Expenditures form with the Quarterly Report
    - Acknowledgement of discrepancies between the projected amount and the real expenditures
- What **conclusions** about program performance are justified based on the available evidence?
    - Is the project doing what it has claimed it will do?
        - What action needs to be taken to see desired results?
    - Should the DF suspend funding or intervene?

For the process indicators measuring the Development Fund's operations, the M&E team divided the measures into the domains of: Capacity Building, Reporting, Equitable and Fair Distribution of Resources, and Innovation and Creativity. Moving towards outcomes, the M&E team defined the indicators in line with the funds dispersed: bursaries, study loans, training schemes and employment schemes. A third dimension tracks data quality assurance and includes: data collection tools and training. The full indicator matrix is provided in Annex C.

2.3 Activity 2: Structuring Data Collection Tools, Templates and Processes

Prior to the initiation of the M&E assignment, the Development Fund had a basic data collection process limited to the information contained in application forms for all schemes and the submission of academic records and receipts for students funded under the education schemes. These forms had been designed for the purposes of implementing service level agreements (the contract that sets the term for the project or individual to be funded), not to track the impact of Development Fund activities. Provided below is a sample of an application form and the minimum data on potential beneficiaries it contains:



FORM 11

REPUBLIC OF NAMIBIA
SOCIAL SECURITY COMMISSION: DEVELOPMENT FUND
[SOCIAL SECURITY ACT, 1994 (ACT NO. 34 OF 1994)]

TO: The Executive Officer
Social Security Commission
Private Bag 13223
WINDHOEK

APPLICATION FOR BURSARY
[Regulation 22 (1)]

1. Surname: ...
2. First names: ...
3. Date of birth: ....../....../.............. ID number: ...
4. Place of birth: ... Passport number (if applicable): ...
5. Postal address: ...
6. Residential address ...
7. Tel. number (.........) ... Fax number (.........) ...
8. E-mail address: ...
9. Study course: ...
10. Higher education institution to be attended: * ...
11. Years of intended study: ...
12. Highest educational qualification (attach certified copy of certificate): ...
13. References:
   (a) Name: ...
   Address: ...
   Telephone number: ...
   (b) Name: ...
   Address: ...
   Telephone number: ...
   (c) Name: ...
   Address: ...
   Telephone number: ...
14. Envisaged cost of study course: N$ ...
15. Where will you be residing? hostel/private accommodation?: ...
16. Have you been offered employment once your study has been completed?
   Yes: .... No: .... If "Yes":
   Name of employer: ...
   Address: ...
   Telephone number: ...
   Contact person: ...

While the application form does contain some basic demographic and background information (including name, address and highest level of education attained to date, there is no information provided here for the Development Fund to create a summary profile of support recipients. For example, no information is requested on the gender, current employment status or even the income level of the household in which the applicant is residing. In addition, all of the forms required for applicants to seek funds must be completed manually. While the forms themselves are located on the Development Fund's website, they are in jpeg format and must be printed out in order to be filled in; they cannot be filled out online using any software programs, which makes the process time consuming to fill out for applicants and cumbersome for the Development Fund selection committee to review and select candidates.

In order to address these gaps, additional data collection forms and processes were developed during the M&E assignment to collect the information required to compile the newly defined indicators, both as numerators and denominators. The full M&E Plan process flow chart can be found in Annex C. Two types of reports were specifically needed to fulfill the requirements of the Development Fund M&E Plan. The first is the Development Fund Annual Report in which it reports its activities to the Namibian

Parliament, the Social Security Commission, the Department of Labor and Social Services and to other funders. The second type of report is the progress report submitted by the individual projects or individual recipients documenting their own activities and progress throughout the year. In order to monitor the activities and success of the projects and individuals, a process of quarterly reporting with report templates, data collection tools and procedures was implemented, each reporting period followed by evaluations of those reports. Prior to the M&E assignment, the Development Fund had an initial quarterly report template for the progress reports from recipients but was willing to modify it to feed into the M&E Plan. The Development Fund expressed clear preferences for how this modified report should look and made several specific requests:

- Progress reports should be submitted quarterly in order to closely monitor delays and problems
- They wanted a quarterly report of how the project was spending the 10% contribution (the beneficiary cost share) in addition to a report of overall expenditures
- The Development Fund was concerned about poor performing projects being neglected and wanted a very clear picture of a project's progress towards their defined goal in each report
- The Development Fund was concerned about transparency and wanted to be able to verify reported data. Consequently the M&E team requested hard copies of reports from beneficiaries to ensure the reports were taken seriously and that project managers and accountants were accountable for the information they were reporting
- Students only needed to submit their receipts and report their grades via academic records twice a year.

The original model for the progress report designed was in the form of a narrative text. As noted early on, the Development Fund had not been asked by funders or stakeholders to report any specific data so they had flexible reporting requirements. However, the Development Fund wanted to generate reports that would specifically demonstrate that it was functioning the way it should. In order to effectively meet the objectives laid out above, the M&E Technical Advisor worked over the course of the assignment to bring the following list of the additional data collection forms into alignment with the M&E plan:

Table 1: Documents Created or Modified for the Development Fund M&E Plan

Name of Tool	Purpose
M&E Plan	This document contains all information about the M&E plan. It can be used to train new M&E personnel and guide changes to the plan.
M&E Final Report Template	This document is a model for the final report for annual Development Fund activities
Possible Report Tables Template	This document contains possible tables that will be used in the final report of Development Fund activities and progress reports that compile data submitted by the projects
Database Design Document	This document has directions to help the database developer update the database to enter new data

Training Manual for Beneficiaries	This manual is a compilation of the PPTs used to train beneficiaries to complete the quarterly progress reports
Training Manual for Evaluators (compliance officers)	This manual is a compilation of the PPTs used to train evaluators of the quarterly progress reports
Grant Advance Request Form	Part of the quarterly report, this document tracks advance requests by projects on a quarterly basis
Demographic Data Form	This document collects data about the individual beneficiaries at the beginning of the Development Fund intervention
Individual Closeout Form	This document collects additional information about the individual participants when funding is concluded.
Additional Organization Data Form	This document collects information about the organizations running training and employment schemes at the beginning of the Development Fund intervention
Organization Closeout Form	This document collects information about the organizations projects upon the ending of Development Fund intervention
Quarterly Expenditure Report Form	Part of the quarterly report, this document records expenditures of project and usage of grant funds on a quarterly basis and submitted with a quarter report' will specifically also track match funding spending
Quarterly Report Summary Form	Part of the quarterly report, this form collects general information that will be reported by the Development Fund in its progress reports to funders
Register Of Participants Form	Part of the quarterly report, this form is to record the participation of all beneficiaries on a quarterly basis
Project Work plan	Part of the quarterly report, this form is updated to report a projects progress in terms of short term goals throughout the funding year
Evaluation Framework	This framework establishes the theory and method for evaluating the beneficiaries progress and

	performance during the funding year(s)
Evaluation Checklist	The checklist guides evaluators and is a record that the progress report was reviewed
Evaluation Tool for Training Schemes with additional worksheets	The evaluation tool is used if a progress report is incomplete or questionable
Evaluation Tool for Employment Schemes with additional worksheets	The evaluation tool is used if a progress report is incomplete or questionable

The original set of tools was useful for selecting candidates but did not collect the full information necessary to show that the Development Fund was reaching the target population or that any particular intervention was successful. The Development Fund specifically requested that the forms be designed in Microsoft Word in order to allow the individual filling them out to do so on a computer for ease and legibility. Certain dynamic features such as checkboxes were used, as well as greyed out text, to guide the format of responses such as dates to ensure they are reported accurately for data entry in the computer. The Development Fund was particularly concerned about being able to verify data; the short timeframe for the M&E assignment, however, did not allow for a full review of technology options (such as mobile phones or using online forms) for reporting. Each question on the forms was written to collect a precise data point and to accommodate the data entry tree formatting that could be used in a mobile device for data collection. Once the Development Fund has established confidence in their reports and reporting methods these options remain possible avenues for exploration.

All forms begin with directions on how to fill it out and a box collecting "identifier" information such as Development Fund number and summary data for the form. Data quality assurance methods were written into the modified forms by including a box in the footer of the first page in which the data entry clerk who enters the data into the database writes in their name and the date on which the form was entered into the database. There is an additional space for a Development Fund manager to review the data on the form and compare it with the actual data in the database. Forms are designed with the same format to facilitate completion, manipulation and modification. In the header of the first page is the title of the form, abbreviated for following pages. In the footer of the first page is a text box marked for "office use only" for database verification and in the footer of each additional page is a box for identifier information: the Development Fund or project number and authorized funding period.

In addition to modifying the data collection forms as described above, the forms can now be provided to the beneficiaries to fill out electronically (using standard Microsoft Word or Excel software packages). This functionality led to the need for an additional activity during the M&E assignment, namely ensuring that the beneficiaries submitting progress reports with these forms had been properly trained in completing their reporting requirements; this will be addressed below in the section on Development of M&E Curriculum for Training.

Data Quality Assurance was written into the M&E procedures in order to provide internal oversight and transparency to Development Fund activities as well as ensure the quality of reported data. Data quality assurance measures aligned with the two levels of monitoring and evaluation. In order to supervise data management internally, steps were added to the data entry, security and storage sectors. Quarterly report evaluation procedures were written to verify the most sensitive activity and financial data reported by projects with the human resources and time available to the Development Fund.

Database

Prior to the initiation of this M&E assignment and the development of the M&E plan, a database had been created by the Social Security Commission's Information Technology Department to store the information collected on paper application forms. The Development Fund team was particularly concerned about internal oversight of data capture and being able to produce reliable reports, with confidence in the data. The Development Fund team reiterated to the M&E Technical Advisor that this was a particular concern and arranged a meeting between the SSC's IT Department and the M&E Technical Advisor to review the database. The following reflects the initial observations of the M&E Technical Advisor upon meeting with the IT Department and reviewing the database:

- The database captures all of the data on the Application Forms, but nothing more.
- The format of the database is user friendly in terms of basic data entry.
- The database is built in a standard format of Microsoft SQL, a relational database that allows for simple queries of data tables. The SSC IT Department recommends using Brio Intelligence, a query software, to work with the data as the SSC owns the license and the IT Department can provide training to the Development Fund upon request.
- Data entry clerks use a single login user name, which makes tracking data entry errors a major problem.
- There is currently no glossary of data elements in the database, which can lead to confusion on what to capture and data quality concerns. For example, "period" is not defined and could therefore refer to a day, month, quarter or other period of time.
- Data for Employment and Training entries are limited to agency level details with no place listed for an individual, for example, to be the contact person.
- Data queries generated by a report cannot be copied, pasted or exported to another software format (e.g., MS Word) to enable its use in a report template or for further manipulation.
- Data is collected into separate databases for each of the four Development Fund domains: bursaries, student loans, training schemes and employment schemes. If one wanted to summarize the total number of applications to the Development Fund for a year, for example, the numbers from each of these distinct databases would have to be manually combined.

On the plus side, the database development team members are in-house staff at the Social Security Commission. On the minus side, the database had clearly been developed with an incomplete set of requirements from the Development Fund, in large part because they had not yet defined their M&E indicators when they began reviewing applications, selecting grantees for awards and disbursing funds. In that dynamic, a minimum set of data elements were built into the database, but leaving many gaps in supporting functionality for the Development Fund's tracking and reporting purposes. In addition, as many of the data elements for indicators and the forms or templates on which they were to be captured were being revised during the M&E assignment, it was not possible to provide the IT Department with a finalized set of data capture and reporting requirements.

Development Fund and project numbers and the authorized funding period are the primary identifiers for all data collection forms except the application materials. When the application materials are entered into the database, a unique number is generated for each application: a Development Fund number for an individual or a project number for a project. In order to protect the identity of individuals benefitting from the Development Fund who may be involved in projects that by definition serve a vulnerable population (for example, people living with HIV/AIDS), measures were added to protect their identities. Instead of using their names, individuals will use their Development Fund number which they will use to link their data in the database. The following is broad guidance from the M&E Technical Advisor to the database design team with regard to updating the database to accommodate the new data collection tools and corresponding reporting requirements, while instituting a nominal measure of data quality checks:

- The database design should remain dynamic in order to accommodate changing needs regarding data collected and reported by the Development Fund.
- The database should be considered, even after completing the current updates, a work in progress as reporting needs of the Development Fund are likely to evolve.
- All the data currently captured on the Quarterly Report forms by beneficiaries (except for the detailed Expenditure Form) should be entered into the database.
- Academic records are entered into the database according to the result table provided by the Development Fund Manager.
- All forms should be related to each other by a unique identifier such as the Development Fund project number and/or signing year of the agreement.
- The database should be tested by the M&E Officer regularly and s/he should maintain a strong relationship with the IT department to ensure that problems are managed quickly and that the database is up-to-date. It would be highly recommended that the M&E officer or other manager learn how to make changes to the database (to accommodate new data) or troubleshoot problems so they are not reliant on IT personnel who work with all of SSC.
- The database needs to be able to log that the forms have been verified by a data entry officer or the M&E officer.
- Changes to records need to be recorded (logged) so that evaluators can verify who made changes to records and when, preferably by recording the login ids and access levels.
- Each data entry clerk needs a unique login, regardless of the number of records he/she enters.
- Each data entry clerk should receive a formal training to demonstrate that they understand the data on the forms and know how to add and correct data in the database. Training of data entry clerks has been made a progress indicator and the total number of participants will be reported in the Annual Report.
- When data elements are added or removed from usage, they should be made "active" or "inactive" rather than being deleted from the records. Examples of those items that may become active/inactive include lists of courses of studies and sectors.
- Frequent meetings between the Development Fund M&E team and the database development team will streamline the updates and modifications process.
- The full spectrum of data from the database should be exportable to MS Excel to facilitate the creation of reports and all distinct databases should be combined to allow for direct aggregation of results.

The M&E Technical Advisor developed a job description for a Data Entry Officer who would report to the M&E Officer and discussed this need with the Development Fund team. The Data Entry Officer's primary task would be to supervise the data entry clerks, verify at least 10% of all forms entered by each clear and ensuring that the data (forms and the database) are maintained in a secure format. Upon completion of the M&E assignment, data analysis at the Development Fund was limited to reading the quarterly reports for adherence to agreements and for fraud; basic statistical analysis of quantitative data generated by the database is also conducted. A true data analysis training was not conducted by the M&E Technical Advisor due to time restrictions and the lack of enough usable data at the end of the assignment. Once the database has been updated and sufficient data has been entered, a data analysis training would be an appropriate activity to initiate.

2.4 Activity 3: Development of M&E Curriculum for Training

The general goal of capacity building is to give individuals or organizations the knowledge, skills and resources to develop and set their own objectives. While Development Fund personnel had excellent management skills and expertise, specific M&E capacity was lacking at the beginning of the assignment. The three month technical assistance period was used as a training period for Development Staff on defining indicators, developing and M&E plan, adjusting tools and templates to capture the required M&E information and culminating in the preparation of a training curriculum to train recipients in the preparation of quarterly progress reports. The Development Fund is contractually obliged to provide training to the beneficiaries to ensure that they are aware of what is required in their progress reports. As tools and templates were being developed and modified over the three-month assignment to feed into the M&E Plan, so too was the need for developing a set of training materials to bring the beneficiaries up to speed with the changes.

The M&E Technical Advisor and the M&E Officer jointly developed the materials for training for those staff supporting the data collection and reporting process. This encompassed a broad group of beneficiaries and Social Security Commission staff. From the beneficiary side, this included project managers, training providers, development agencies, students benefitting from bursaries and study loans, M&E officers and project officers. From the Social Security Commission, this included compliance officers who would serve as evaluators.

2.4.1 Trainings

Following the formats usually used for trainings within the Social Security Commission, the M&E team utilized a series of PowerPoints in small workshop settings, generally having from 5 to 12 participants in each. The PowerPoint slides themselves were printed in Notes format and presented to the participants to use as a training manual. Over the course of six weeks, the M&E Technical Advisor and M&E Officer jointly conducted four workshops in four distinct regions around Namibia. During the trainings, they defined each data element on the reporting forms and explained the purpose of each form in the context of contractual requirements and in the broader M&E context. The M&E team maintained a log of training participants in order to ensure that all recipients were covered with the trainings. Provided below in Table 2 is a summary of the training locations and demographics.

Table 2: Trainings Conducted with HFG support

Training Location	Male Participants	Female Participants	Total
Gobabis	5	3	8
Katima	5	4	9
Oshakati	6	6	12
Walvis Bay	4	1	5
TOTALS	**20**	**14**	**34**

A fifth training of beneficiaries and compliance offices was conducted by the Development Fund M&E officer in conjunction with SSC staff after the completion of the M&E assignment, which demonstrates the competencies developed by the M&E Officer during the course of the assignment period. All training materials developed have been documented and logged on the Development Fund computer systems and can be updated as needed by the M&E team. It is expected that compliance officers will be trained in September or October to evaluate the quarterly reports using the materials that were developed. Additional training was provided to the M&E Officer by the M&E Technical Advisor to enhance his computer and data analysis skills. This one-on-one capacity building focused on enhancing skills needed to continue updating the M&E plan, tools and templates. The short duration of the M&E assignment did not allow for broader trainings with the other Development Fund staff.

3. SUMMARY FINDINGS AND NEXT STEPS

The M&E Technical Advisor undertaking this assignment conducted an intensive effort to build the M&E capacity of Development Staff during a three-month secondment to the M&E team from May – July 2013. Overall, the primary objectives of the assistance were achieved with the creation of an M&E plan tailored to the DF's specific requirements and the knowledge transfer to Development Fund staff to administer the plan as designed.

This domain was clearly improved by the creation of the monitoring indicators and the development of an M&E plan during the three month assignment. While all domain scores improved from the baseline, the domain with the lowest score remained Organizational and Human Resources for M&E. This is in large part due to the fact that no additional M&E staff members were added to the team, nor were formal trainings in M&E completed during this assignment period, beyond the organized experiential training during which the M&E officer collaborated with the Technical Advisor. It also remains an open question whether suggestions for increasing the level of staffing for M&E will be taken up by the Development Fund management. In addition, there needs to be a plan developed for providing specific M&E training of Development Fund staff in order to continue enhancing their skills.

The long term sustainability of the M&E plan and reporting processes will be impacted by the continuing commitment of the Development Fund team to these areas without a seconded M&E Technical Advisor in place. Commitment can be measured in the application of the M&E tools developed during this assignment, the database changes to accommodate the new data that will be collected, in the human and financial resources being applied to M&E activities at the Development Fund and ultimately in the ability of the Development Fund to compile and distribute the Development Fund Annual Report. Based on the activities conducted during this assignment and the commitment of the Development Fund staff to embracing the new tools and skills shared, the M&E Technical Advisor is confident that the Development Fund will move to the next level in achieving their M&E objectives. In order to support these efforts, a set of "next steps recommendations" have been developed as follows:

- The M&E Plan should be widely shared with and explained to the Social Security Commission and Development Fund beneficiaries in order to ensure that all key stakeholders are bought in to the monitoring and evaluation process.
- The M&E plan should be revisited annually and updated if necessary to ensure that reporting requirements continue to be met.
- The compliance officers should be trained as scheduled in order to support the M&E officer's project evaluations. The training materials for quarterly report evaluators have

been developed during the assistance and the trainings have been loosely scheduled for late September/early October.

- The Development Fund should recruit a full-time Senior M&E Officer or remove the Education Officer duties from the current M&E Officer (and assign them to a newly hired staff person) in order to most effectively prioritize the M&E activities.
- The application process for grants, loans and training schemes relies heavily on paper forms and initiates a time consuming process for applicants and reviewers alike. Many of the components of this process would benefit from using technology solutions. The Development Fund would benefit greatly from reviewing their business processes (in conjunction with other units within the Social Security Commission) and evaluate options for improving their processes. There is likely to be a significant reduction level of effort required for the application, selection and monitoring process resulting from this business process analysis.
- The development of a longitudinal study to follow beneficiaries and determine the long-term impact of Development Fund activities would provide great benefit to future programming.
- The Development Fund should explore potential partnerships with other government agencies (notably the Ministry of Health and Social Services) to receive training on how to ensure privacy and security of data and individuals when dealing with vulnerable populations (e.g., those living with HIV/AIDS).

ANNEX A: TECHNICAL ASSISTANCE WORK PLAN

Technical Advisor for Monitoring and Evaluation STTA to Social Security Commission				May																														
DELIVERABLE	MODIFICATION AS DEL.	CORRESPONDING DOCUMENTS and ACTIVITIES	RESPONSIBLE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
M&E Plan			CMP and DK																															
		Review and finalization	DF team																															
		Presentation to SSC-DF	CMP and DK																															
Indicator Matrix			CMP and DK																															
		Review and finalization	DF team																															
M&E Report template			CMP and DK																															
		Review and Finalization	DF team																															
M&E Manual			CMP and DK																															
		Review and finalization of Manual	DF team																															
	Database		Nuuyoma																															
		Review and Finalization	DF team																															
Data Collection																																		
		Annex J	CMP and DK																															
		Annex K	CMP and DK																															
		Annex L	CMP and DK																															
		Annex M	CMP and DK																															
	Data Collection																																	
		modified Annex C	CMP and DK																															
		Review and finalization of Documents	DF team																															
	Database Manual		Nuuyoma																															
		Review and Finalization																																
Quarterly Reports			CMP and DK																															
		modifed additional materials	CMP and DK																															
		training materials (beneficiaries)	CMP and DK																															
		Review and Finalization	DF team																															
Quarterly Evaluation Reports			CMP and DK																															
		training materials (compliance officers)	CMP and DK																															
		Review and Finalization	DF team																															
Trainings		site visit trainings	CMP and DK																															
for future strengthening of the Development Fund's M&E system			CMP																															
		Review and Finalization	Project Mgmt team and CMP																															
		DUSCAN TIMELINE	DK																															

ANNEX B: DEVELOPMENT FUND INDICATOR MATRIX

CREATED: 15 MAY 2013

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013	
						Target	Result
Component 1: MANAGEMENT							
1.1 Capacity Building							
1.1.1 DF team trained to train Data Collectors and Data Entry Clerks on the data elements	**Number** and **percentage**: total **number** of management team personnel who can train new particiants or contributers to ensure consistent continutity of DF standards. [*Numerator: number of management team personnel trained]* [*Denominator*: total number of management team] *Calculation:* [Numerator ÷ Denominator] x 100	DC: M&E Officer Reporting: M&E Officer	*Data source*: Annual report *Reporting frequency*: Annually			4, 100%	
1.1.2 Individuals successfully reapplying for another award	**Number** of individuals who have previously been the beneficiary of a type of grant. This is a new grant, not an additional year of a multi-year grant.	*DC:* M&E Officer *Reporting:* M&E Officer			This number is collected on the Demographic Data form, Annex J		

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results	
						2013	
						Target	Result
1.1.3 Total number of all beneficiaries individuals who are employed at the end of the intervention or year.	**Number** of "beneficiaries" who are employed when their partipipation with the project ends or the funding period of the project ends or at the end of this fiscal year.	*DC:* Recipients *Reporting:* M&E Officer	*Data source*: Individual and Organization Closeouts *Reporting frequency*: Annually	Sector	This data is collected primarily on the Individual Closeout form, Annex L, and cross-referenced with the Participant Registry submitted each quarter.	TBD	
1.2 Reporting							
1.2.1 Quarterly Progress Reports to demonstrate adherence to goals and progress of DF projects throughout project timelines	**Four Reports** submitted to the DF Manager every year	DC: M&E Officer Reporting: M&E Officer	*Data Source:* Quarterly Reports Progress Reports *Reporting Frequency:* Quarterly		Reports will be prepared and submitted. Copies of these can be used as documentation.	2	
1.3 Equitable and Fair Distribution of Resources							
1.3.1 Number of individuals benefitting from Development Fund awards	**Number**: total **number** of direct beneficiaries.	DC: recipients Project Manager Reporting: M&E Officer	*Data source*: Annual report *Reporting frequency*: Annually	Gender, age		TBD	
1.3.2 Efforts to encourage all eligible individuals to apply.	**Number** of applicants for study loans, bursaries **Number** of applications for Training and Employment Scheme	DC: recipients Project Manager Reporting: M&E Officer	*Data source*: Application forms *Reporting frequency*: Annually	Scheme			

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013	
						Target	Result
1.3.2.1 Proactive marketing campaigns to inform eligible individuals and projects to apply for grants.	**Number** of career fairs, presentations, and other marketing campaigns conducted to advertise the DF	DC: DF management team Reporting: M&E Officer	*Data source*: Expense reports, receipts, media, that demonstrates corresponding marketing activities *Reporting frequency*: Annually				
1.3.3 Participation of eligible Namibian Citizens and permanent residence holders	**Number** and **percentage** of beneficiaries and number of citizens and number of permanent residence holders [*Numerator: citizen or permenent residence holder]* [*Denominator*: total number of award beneficiaries] *Calculation:* [Numerator ÷ Denominator] x 100	DC: Beneficiary Reporting: M&E Officer	*Data source:* Demographic Annexure *Reporting frequency*: annually				
1.3.4 Participation by eligible individulas of all age groups of beneficiaries	**Number** and **percentage**: The database will sort beneficiaries by birth date into prescribed age tranches. *[Numerator:* the number of individuals in a certain age tranch] *[Denominator:* the total number of beneficiares of Development Fund grants] *Calculation*: [Numerator ÷ Denominator] x 100	DC: Beneficiary Reporting: M&E Officer	*Data source: Application materials:* Demographic Annexure *Reporting frequency*: Annually				
1.3.5 Participation of members of marginalized groups benefiting from DF Schemes .	**Number** and **percentage** of individuals identifying with a specific, legally-defined, marginalized group. [Numerator: Number of individuals identifying with each type of marginalized	DC: Beneficiary Reporting: M&E Officer	*Data source:* Demographic Annexure *Reporting frequency*: annually				

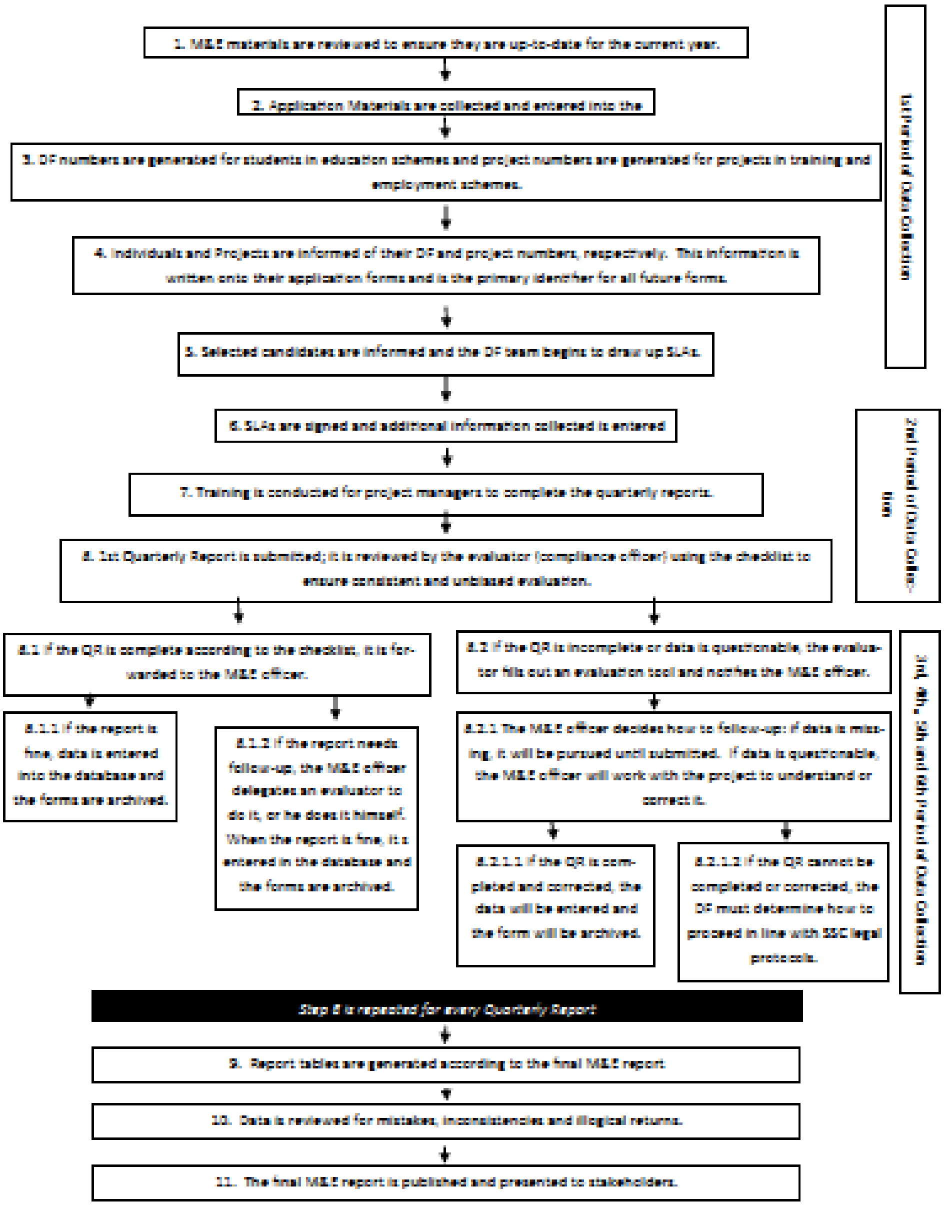
Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013 Target	Annual Targets and Results 2013 Result
	group] [Denominator: Total number of beneficiaries] Calculation: [Numerator ÷ Denominator] x 100						
1.3.6 Regions benefitting from the DF awards	**Number** of projects per region **NAD amount** awarded to each region	DC: Beneficiary Reporting: M&E Officer	*Data source:* Application Materials *Reporting frequency*: Annually			Equal awards per region. N.A. TBD	
1.4 Innovation and Creation							
1.4.1 Legal status of the DA	**Number** of DAs of each of five possible legal statuses	DC: Project Manager Reporting: M&E Officer	*Data source*: Organization Additional Data (Annexure K) *Reporting frequency*: Annually	Legal status		N.A.	
1.4.2 Number of strategic alliances created through project activities	**Number** of strategic alliances created through project activities	DC: M & E officer or compliance officers Reporting: M&E Officer	*Data source:* Quarterly verification reports *Reporting frequency*: Quartely				
1.4.3 Number of training, capacity building and employment initiatives deemed innovative	**Number** of training, capacity building and employment initiatives deemed innovative	DC: M & E officer or compliance officers Reporting: M&E Officer	*Data source:* Quarterly verification reports *Reporting frequency*: Quartely				

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013 Target	Result
Component 2: FUNDING ACTIVITIES							
2.1 Bursaries							
2.1.1 Number of individuals who receive a bursary	**Number** of individulas who receive a bursary	DC: Beneficiary Reporting: M&E Officer	*Data source:* Project records (database) *Reporting frequency*: Annually	Gender, Age		33	
1.1.3 Number of individuals who are employed at the end of the intervention	**Number** of individuals who end their studies early because of employment or the number who are employed after their education is complete	DC: beneficiaries Reporting: M&E Officer	*Data source*: Individual Closeout *Reporting frequency*: Annually	sector			
Component 2.2: Study Loans							
2.2.1 Number of individuals who receive a study loan	Number of individulas who receive a study loan	DC: Beneficiary Reporting: M&E Officer	*Data source:* Project records (database) *Reporting frequency*: Annually	Gender, Age		27	
2.2.3 Number of individuals who are employed at the end of the intervention	Number of individuals who end their studies early because of employment or the number who are employed after their education is complete	DC: Beneficiary Reporting: M&E Officer	*Data source*: Individual Closeout *Reporting frequency*: Annually	sector			
Component 2.3: Training Schemes							
2.3.1 Number of participants who are trained due to funding provided by the DF	**Number** of individulas who are trained due to funding provided by the DF	DC: Project Manager & Beneficiaries	*Data source:* Quarterly and Final reports *Reporting frequency*: Quartely and Annually	Gender, Age		??	
2.3.2 Number of individuals who are employed	**Number** of individuals who end their	DC:	*Data source*: Individual	sector			

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013 Target	Annual Targets and Results 2013 Result
at the end of the intervention	participation early because of employment or the number who are employed after their education is complete	Beneficiaries/ Project Manager Reporting: M&E Officer	Closeout/ Participant Registry *Reporting frequency*: Annually				
Component 2.4: Employment Schemes							
2.4.1 Number of employment schemes given grants	**Number** of employment schemes given grants	DC: Project Managers Reporting: M&E Officer	*Data Source: Annexure E* *Reporting frequency: Quartelly and Annually*			27	
2.4.2 Number of individuals who gained employment with DF funds	**Number** of individuals who gained employment with DF funds	DC: Beneficiaries Reporting: M&E Officer	*Data Source: Demographic Annexure* *Reporting frequency: Annually*				
2.4.3 Number of individuals who are employed at the end of the intervention	**Number** of individuals who end their participation early because of employment or the number who are employed after their education is complete	DC: Beneficiaries/ Project Manager	*Data source*: Individual Closeout/ Participant Registry *Reporting frequency*: Annually				
Component 3: DATA QUALITY ASSURANCE							
3.1 Data Collection Tools							
3.1.1 Data Collection Tools designed and modified to accurately collect necessary data reporting	**Number** and **names** of data collection tools designed or modified to produce meaningful and accurate reports	*DC*: M&E Officer *Reporting*:	*Data source*: Data Colelction Tools *Reporting frequency*:		Copies of each data collection form can be used as documentation. The list of DC tools should be in the M&E plan and Manual, updated yearly	TBD	

Performance Indicator	Indicator Definition and Unit of Measure	Party Responsible	Data Source(s) and Reporting Frequency	Disaggregated by	Data Collection Method	Annual Targets and Results 2013 Target	Result
		M&E Officer	Annually				
3.1.2 M&E Plan is drafted to state the onjectives of the data colelction process and provide guidelines for transparant and accurate reporting. This Plan should be reviewed/updated yearly.	**Number** of M&E plans reviewed and or drafted every year.	*DC*: M&E Officer *Reporting*: M&E Officer	*Data source*: Report *Reporting frequency*: Annually		A copy of the M&E plan serves as documentation of this report.	1	
3.1.3 Database is reviewed for proper functioning and to ensure it is up-to-date to accommodate any changes that may have been made to the DC tools	**Number** of Reports that demonstrates that the database has been tested and reviewed	*DC*: M&E Officer or Data Entry Officer *Reporting*: M&E Officer	*Data source*: Report *Reporting frequency*: Annually			1	
3.1.4 M&E Report to confirm that the DF is functioning as it should and reports are produced accurately. This includes a description of the evaluation and verification processes of the M&E plan.	Number of M&E reports produced annually to address the ultimate objectives of the project.	*DC*: M&E Officer or Data Entry Officer *Reporting*: M&E Officer	*Data source*: Report *Reporting frequency*: Annually			1	
3.2 Training							
3.2.1 Primary Data Collectors (Project Managers) are trained to accurately report project activities in a timely fashion	**Number** and **percentage** of DCs trained to accurately report project activities [*Numerator: number of DCs trained]* [*Denominator*: total number of primary DCs] *Calculation:* [Numerator ÷ Denominator] x 100	*DC*: M&E Officer *Reporting*: M&E Officer	*Data Source(s):* Training Participation Registration *Reporting Frequency:* Annually				
3.2.2 Data Entry Clerks are trained to accurately enter data from data colelction tools	**Number** and **percentage** of DECs trained to accurately report project activities [*Numerator: number of DECs trained]* [*Denominator*: total number of DECs] *Calculation:* [Numerator ÷ Denominator] x 100	*DC*: M&E Officer *Reporting*: M&E Officer	*Data Source(s):* Training Participation Registration *Reporting Frequency:* Annually				

ANNEX C: M&E PLAN PROCESSES FLOW CHART



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