Policy on Monitoring and Learning System (M&L system) of Samarthan

Samarthan has a semi-formal and flexible learning system to capture the outputs, outcomes, and processes of various interventions organized from the donor resources or from the core resources of Samarthan. The M&L system of Samarthan is laid down in the following manner:

1. There are formats of planning (P1 and P2) primarily designed for the monthly and quarterly planning for the regions/districts offices which are running one or more than one programme. The Quarterly formats are to be filled by the 5th of beginning of every Quarter. The Quarterly plans will be discussed with the Programme Directors and presented to the Executive Director for approval. The approved Quarterly plans will be sent to the Accounts and Programme Monitoring Unit for release of resources and monitoring. (Annex-1)

2. The Programme Directors/regional/district or programme managers are required to fill the monthly activity plan and cash flow requirement in the monthly format and should be submitted by the 5th of every month. The Accounts department will organize the fund transfer with the permission of the Programme Director/Executive Director.

3. The format on Quarterly Reporting (R1 and R2) needs to be filled on the completion of the quarter. The regional manager/Programme Director will have to ensure that the Quarterly progress report is filled up in the prescribe format and submitted not later than the 10th of every first month of the new quarter. (Annex-2)

4. The field staff will also prepare case studies on the best practices/examples that can be put up on the website or otherwise for wider dissemination of learning.

5. Special research reports/process documents will be prepared based on the project/organisational requirement. Such documents will be finally approved by the Programme Directors/Executive Directors before these are submitted to the donors or put up in public domain.

6. All project co-ordinators will ensure that annual report of the project is submitted for the financial year to PMU, Samarthan. Many projects have different project cycle, therefore project co-ordinators are advised to complete the reporting till the end of the financial year.

7. The staff is advised to write in Samarthan supported newspaper ‘Pancham’ on regular basis based on the field experiences and research reports. The contribution will be appraised during the annual appraisal of the staff.

8. All the project co-ordinators are expected to fill up the MIS of the donor projects as per the donor requirement. The deadlines should be strictly followed.

9. The accounts department will provide monthly Financial MIS. All project co-ordinators should review the variance and submit a report to the Executive Director/Programme Director on underutilization or excess utilization of budgets.

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