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MONITORING TOOLKIT:

HOW TO DEVELOP A MONITORING SYSTEM FOR A COMMUNITY RIGHTS WORKERS PROGRAM

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An Anonymous Donor

Luwero Nakaseke Paralegals Association (LUNAPA)

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PURPOSE OF THIS TOOLKIT

This toolkit is designed to introduce the reader to project monitoring and why it is an essential component of any community rights workers program. The reader is taken through a step-by-step process to develop a monitoring system. By following these steps, the reader can create a monitoring system specific to her/his own program. A Land Rights Organization in Uganda used this toolkit to design a monitoring system for its community rights workers program in Luwero district. Its experience is used as an example throughout the toolkit to provide a real-world illustration of the process. Though qualitative monitoring and feedback sessions with rights workers are also important sources of valuable information, this toolkit focuses on quantitative monitoring to understand the program and community needs.

INTRODUCTION

Monitoring is the repeated assessment of ongoing program activities to describe what the program is doing. Monitoring answers the "who," "what," "when," "where" and "how" of a program: "What activities are carried out?" "Who is responsible for the activities?" "When and where do activities take place?" and "How or by what methods are activities carried out?" By regularly tracking the activities and performance of a program throughout its life, monitoring can explain what services a program is providing, how it is carried out, and what populations are benefiting.

Organizations monitor their programs to understand the "big picture" about what is happening in the program, who it is reaching and how it is being implemented. The organization can analyze the information collected about program activities and performance to strengthen and sustain the program. Specifically, organizations can use monitoring data to:

Understand the program: Programs often involve many staff carrying out different activities, making it difficult for an organization to track exactly what has been implemented. This is particularly relevant for a community rights workers program, where many rights workers are providing services in different and sometimes remote locations. The rights workers' documentation and reporting of their activities will help the organization to know the types and amount of services they are providing to the community and who is using the services.

Improve the program: Monitoring can provide information about program beneficiaries, successful activities and implementation challenges. An organization can use this information to strengthen aspects of the program that are working, change areas that need improvement and provide needed resources to beneficiaries. For a community rights workers program, tracking the cases that community members bring to the rights workers will help an organization identify what areas of the law are most relevant for training and will help rights workers to identify what topics to cover in their sensitization events. Monitoring actions the rights workers take to resolve cases will help the organization assess whether they are giving appropriate advice to the community members. Monitoring also is a way for the rights workers to describe what additional resources they need, their questions, their successes and their challenges.

Leverage funding: Attracting potential funders is an important use of monitoring data. A proposal or discussion with a funder is much more effective with a concrete presentation of data to describe the issues. For example, which one of these statements better explains an organization's need for more money to buy bicycles for community rights workers? "Our organization needs bicycles because the rights workers need to travel long distances each day just to get to their clients, which limits the time they have to help their clients"; or, "Our organization needs bicycles because the rights workers are traveling on average four hours a day just to reach their clients, limiting their time with clients to an average of two hours a day. If a rights worker had a bicycle, she could handle 20 more cases every year." Having data that strengthen a case for funding will put an organization a step above others.

Make budgetary decisions: Organizations have limited budgets for their projects, and so it is important for them to spend money as efficiently as possible. Monitoring can help identify what activities and resources the organizations should spend their money on to best support the program.

Monitoring data answers important questions about a program. Each organization can develop its own list of questions to answer based on its priorities. Below are examples of common questions that monitoring can answer about a community rights workers program:

- What services did rights workers provide?
- What is the average case load of each rights worker?

- What proportion of cases is about a specific topic?
- Are some kinds of cases or conflicts becoming more common?
- What types of cases are women bringing to the rights workers?
- What topics do community rights workers need more training in?
- What type of sensitization event has the most female participants?
- What topics are the communities interested in learning about?

STEPS TO DEVELOP A MONITORING SYSTEM FOR A RIGHTS WORKERS PROGRAM

This section outlines six steps to develop a monitoring system. In going through these steps, the reader can create and implement a monitoring system for his/her specific rights workers program.

The International Center for Research on Women (ICRW) led a Land Rights Organization through this step-by-step process to develop a monitoring system for its community rights workers program in Uganda. The outputs of each step for its program are used as examples throughout this toolkit. The box below briefly describes its rights workers program.

Luwero Community Rights Workers Program

In 2008, a Kampala-based Land Rights Organization began a program to train and support community rights workers in different areas throughout Uganda. The program aims to create sustainable independent community based organizations (CBOs) for rights workers. ICRW and the Land Rights Organization developed a training manual on gender and property rights and piloted it to train 20 community rights workers in Uganda's Luwero District. The community rights workers serve 9 of the 17 sub-counties in Luwero district. Two to four rights workers work in each sub-county served.

The rights workers provide two services to community members: giving legal advice for individual cases and holding sensitization events for the community members. Individual clients come to the rights workers for advice on a legal issue. The rights workers have been trained to provide legal advice to the client, instruct the client on legal processes or refer the client to another legal body for additional assistance. The rights workers also hold sensitization events to inform community members about specific legal issues. Rights workers choose the topics of the events based on the issues that are relevant in the community.

The Land Rights Organization wanted to track activities provided through the program, including what activities the organization is doing with the rights workers and the services that the rights workers are providing to their communities. The organization hopes to use this information to replicate the activities with other rights workers groups in Uganda.

Step 1: Set Goals for the Monitoring Data

A ***goal*** is a broad statement of a desired, long-term outcome. Organizations are probably familiar with setting goals for their programs. This step asks the organization to set goals for the use of the monitoring data.

Some common examples of monitoring goals are:

- Improve programming
- Report activities to the donor
- Attract funders
- Understand and replicate the program

Key program personnel should meet to discuss the monitoring goals. Setting goals will help clarify why they want a monitoring system for their program, what they hope to learn from the monitoring and how they plan to use the information once it is collected.

Once the monitoring goals are established, organizations should list the main questions they want their monitoring system to answer to help them reach these goals. For example, if the organization's goal for the monitoring system is to attract funders, it may want monitoring data to answer the following questions:

- How many rights workers have been trained?
- How many cases do the rights workers handle?
- How many people do the rights workers reach with sensitization events?
- Who uses rights workers?
- Where are more rights workers and additional training needed?
- How much does it cost to support a rights worker?

Throughout the process of creating the monitoring system, the organization should refer back to these key questions to ensure that each step is in line with its ultimate goals.

Goals for Luwero Community Rights Workers Program

Key personnel in the Land Rights Organization met to discuss how they plan to use the monitoring data. From this discussion, they defined their goals for monitoring data. They also listed the major questions they wanted to answer with the monitoring data to achieve each goal. Two of the goals and the corresponding questions are below.

Goal: Inform rights workers programming and training
The Land Rights Organization wants to use the monitoring data to strengthen the existing rights workers program and use the lessons learned to improve similar programs in the future.

Questions to answer to achieve this goal:

- What training, resources or assistance do rights workers need?
- What legal action do the rights workers take on different types of cases?
- Who are the clients?
- Which rights workers have the most and fewest numbers of cases?
- What types of sensitization events have the highest and lowest participation of women?
- What areas have the highest and lowest number of sensitization events?
- What challenges do rights workers face?

Goal: Process monitoring (document what activities have been done):
The Land Rights Organization hopes to establish independent rights workers CBOs throughout the country. They want the monitoring data to capture both what activities the organization did with the rights workers, and what activities the rights workers did with communities so that they can be replicated with similar groups in Uganda.

Questions to answer to achieve this goal:

- How many trainings did the rights workers receive, and on what topics?
- Who conducted the trainings?
- What topics of technical assistance have the rights workers received?
- What methods of technical assistance were the most successful?
- How many client visits were held in each village?
- How many sensitization events were held in each village?
- What types of sensitization events were held?
- What leaders or organizations were involved in the sensitization events?

Step 2: Describe Program Activities

To develop a monitoring system that successfully tracks all relevant activities, an organization must know what activities the program will implement. Therefore, the second step is to list and describe each program activity. The description should include:

- Name of the activity
- Who will participate (both organization staff and beneficiaries)
- Frequency of the activity
- Where and when the activity will take place
- How the activity will be implemented

A detailed description of each activity will help the organization identify important information to collect and report (Step 3), create appropriate monitoring forms (Step 4), and develop a realistic monitoring implementation plan based on the logistics of program activities and constraints of the participants (Step 6). Describing program activities is particularly important if a specific activity is not completely concretized. Sometimes activities evolve as the project unfolds. In such cases, the information collected, monitoring forms and monitoring implementation plan need to be general enough to capture whatever the activity comes to be as the project develops.

Activities for Luwero Community Rights Workers Program
The Land Rights Organization determined the following activities for the rights workers program. This included both the activities that the Land Rights Organization planned to conduct with the rights workers and the activities that the rights workers would conduct with the communities.

Land Rights Organization Activities:

- Training of rights workers
  The organization will conduct a five-day training of 20 rights workers in Luwero town. Five instructors will teach different parts of the rights workers manual. One staff person will translate and take notes.
- Technical assistance to rights workers
  Throughout the project, the organization will help the rights workers with any issue that is causing them difficulty. Technical assistance topics may include monitoring, legal issues, problems with community leaders and help with difficult cases. The topics will be identified by direct feedback from the rights workers, observation by program staff and findings from the monitoring data. Staff will travel to Luwero town to provide this assistance during a monthly meeting of the rights workers.

Rights Workers Activities:

- Client visits
  Community members who have legal issues can come to the rights workers to discuss their problem. Visits will take place at the rights worker's home or another location on request. Rights workers can provide legal advice, refer the client to another legal institution or mediate if another party is involved.
- Sensitization events
  Rights workers will hold events to sensitize community members about pertinent legal issues. They can hold their own meeting, speak at another community meeting, travel house to house, post legal information or speak on a radio show. The rights workers choose their own topics based on relevant issues in the community. Sometimes rights workers will work together or with a local leader on the sensitization event.

Step 3: List Priority Information for Each Activity

Step 3 builds upon the outputs of the last two steps: the monitoring goals, key questions and the list of activities. For each of the monitoring goals and key questions, the organization needs to list what information it needs. It is helpful to first think about what program activities will produce the information to answer each key question. Then for each activity, the organization can list the information it needs to collect. Separating the priority information by activity will also prepare the organization for the next step (developing monitoring forms) because monitoring forms are typically activity-specific.

There is usually substantial overlap across the information required to achieve different goals. This just means that the same information can serve multiple purposes.

Once all of the important information is listed, prioritize the most important and identify and eliminate information that may be too difficult to collect. Be sure that you are collecting enough information to achieve the monitoring goals.

Priority Information for Luwero Community Rights Workers Program

Two goals of the Kampala-based Land Rights Organization are presented here:

1. Inform rights workers programming and training
2. Process monitoring for replication

The chart below lists the priority information that needs to be collected to achieve each of these goals. The chart is organized by goal and then by the activity that will produce the information to achieve each goal.

Monitoring Goal	Questions	Activities	Priority Information
Inform rights workers' programming and training	• What training, resources or assistance do rights workers need? • What legal action do the rights workers take on different types of cases? • Who are the clients? • Which rights workers have the most/fewest number of cases? • What challenges do the rights workers face?	*Client Visits by Community Rights Workers*	• # of cases rights workers handle • Topics of cases • # successfully resolved • Actions taken by rights workers • Beneficiary demographics (gender, age, village)
	• What types of sensitization events have the highest and lowest participation of women? • What areas had the highest and lowest number of sensitization events?	*Sensitization Events by Community Rights Workers*	• # of community sensitization events • Topics of events • Method of sensitization (role play, song, etc.) • # of men/women attending • Mobilization method • Village of sensitization events
	• What challenges do the rights workers face?		• Feedback from rights workers on challenges
Process monitoring (document what activities are being done and who is being helped)	• How many and what types of training have the rights workers received? • Who conducted the trainings?	*Training of Rights Workers*	• # of men/women trained • Trainee's demographics (name, age, village) • # of trainings • Duration of training • Date of training • Topic of training • Name of trainer/other staff
	• What topics of technical assistance have the rights workers received? • What methods of technical assistance were the most successful?	*Technical Assistance to Rights Workers*	• # of technical assistance meetings • Logistics of assistance (date, duration, location, name of provider) • # of men/women receiving assistance • Type of assistance • Description of assistance • Findings/outcomes from assistance
	• How many client visits were held?	*Client Visits by Community Rights Workers*	• Date of visit • Duration of visit • # of cases • Topics of cases • Outcome of case • # of visits to resolve case • Beneficiary demographics (sex, age, village)
	• How many sensitization events were held in each village? • What types of sensitization events were held? • What leaders or organizations were involved in the sensitization events?	*Sensitization Events by Community Rights Workers*	• # of sensitization events • Topics of sensitization events • Duration of events • Means of discussion • # of men/women attended • Villages of events • Organizations/leaders involved (if any)

Step 4: Develop Monitoring Forms

A ***monitoring form*** outlines or dictates what information to collect about a certain activity or program. Monitoring forms can seek a narrative and/or numerical response about the activity. In Step 4, the organization will develop monitoring forms for each program activity to collect the priority information identified in Step 3.

Monitoring forms have many advantages over narrative reports:

They define important information to be collected.
Through a monitoring form, an organization can dictate exactly what types of information staff collect and report. Monitoring forms typically ask direct questions to elicit specific responses. Information provided through narratives, on the other hand, is at the discretion of the staff submitting the report and might not be of use to the organization.

It is easier to enter and analyze data collected through forms.
Information that is documented through structured monitoring forms is easier to enter into a statistical program because the data entry personnel know exactly where the important information is located on the form. Reading through many narratives and picking out the important information is much more time consuming for organization staff.

They improve consistency across respondents.
Consistency in data collection means that the same information is collected in the same way across respondents. Monitoring forms improve the consistency of monitoring data because they dictate that the respondents collect exactly the same type of information. The data different respondents collect can then be easily combined to say something meaningful about the organization as a whole.

There is no specific formula to create a monitoring form, but here are good practices to follow:

Consider the constraints of the person filling out the forms.
Organizations want to create monitoring forms that are easy for the respondents to fill out. For example, if some respondents are illiterate, the form may need to include pictures. If the respondents don't speak English, the organization should translate the forms into the local language.

Consider how the activity will be implemented.
Go back to the detailed description of each activity and ensure that the form will allow the respondent to capture monitoring data easily. For example, a rights worker realistically will not be able to answer all the specific questions on a monitoring form during a client visit. Therefore, the monitoring form that collects information about client visits should include a section for the rights worker to take notes. After the visit, the rights worker can use these notes to answer the other questions on the form (see Case Log form).

Make forms as simple and transparent as possible.
Respondents are more likely to take the time to complete the monitoring form if it is user friendly. Make sure the form is as self-explanatory as possible with clear headings and directions. Try to condense the form to one page if possible.

Make sure there is enough space to write.

If the respondent needs to write very small or in the captions of the form, the information collected may not be legible or may be difficult to interpret. It is better to create a two page form than to have the information crammed into a small space.

Include lists of possible responses.
Providing the respondents with a list of possible responses to questions on the form will increase the consistency between forms completed by different people. For example, a question about a client's marital status may have the choices of "Single," "Married," "Divorced" or "Widowed." A list of choices will ultimately make the information collected from different respondents easier to combine.

Leave a space for respondent comments.
In some cases, the respondents may have limited opportunity to report back to the organization about challenges, successes, or other important comments about their activities not captured in the forms. It is a good practice to leave a space for respondents to write important comments so they can provide direct feedback to the organization.

Once the form is created, the organization should train rights workers on the meaning of each question, the meaning of each listed response and how they expect the rights workers to fill out the forms. Training ensures that respondents share a common understanding of what type of information the organization is seeking for each question.

Monitoring Forms for Luwero Community Rights Workers Program

To collect the priority information listed in Step 3, the Land Rights Organization developed monitoring forms for the following activities: rights workers' training, technical assistance to rights workers, client visits and community sensitization events.

- **Training Log**
  This form documents the organization's training of the rights workers. A separate form is filled out for each training event. The form collects information on training topics, who participated and demographics of the rights workers. It includes an attendance section for trainings that last multiple days.

  The data collected through this form tell the organization: 1) how many rights workers they have trained; 2) training topics; and 3) the types of individuals that become rights workers. The organization has already used this information to explain the expertise of their rights workers in reports to their current donors and proposals to potential funders.

- **Technical Assistance Log**
  This form tracks the technical assistance that the Land Rights Organization staff provide to the rights workers. At the start of the program, the specifics of the technical assistance activity were not well defined. Therefore, the organization created a form that collects broad information about the activity. The questions on the form request many narrative responses that can later be interpreted and coded. The form collects information on the type of technical assistance provided, the beneficiaries of the assistance, outcome or follow-up required and the logistics of the assistance meeting.

  The data collected through this form will tell the organization: 1) what type of assistance specific rights workers are receiving and 2) what results from the assistance. The organization will use this information to create best practices for planning, design and implementation of future programs.

- **Case Log/Monthly Client Visit Log**
  The rights workers wanted to keep a record of their client visits, so the Land Rights Organization developed two forms. The first form, Case Log, documents information about the client, the type of case and the actions of the rights workers. This form was specifically designed to be easy for the rights workers to use during a client meeting. There is space on the back of the form for rights workers to take notes during the visit. After the visit, the rights workers can use the notes to answer the other questions on the form. The rights workers keep the Case Log for their records, but every month transfer the information from each log to a Monthly Client Visit Log to report to the organization. For this reason, all the questions on the Monthly Client Visit Log are the same as on the Case Log. Many of the questions have a list of possible responses for the rights workers to choose from.

  The information collected through these forms tells the organization 1) how many client visits were held; 2) what types of cases rights workers are handling; 3) what actions rights workers are taking with their clients; 4) the outcome of the cases; and 5) personal information about the client. Through this data, the organization identified that landlord and tenant disputes have become an increasingly important issue in the target communities, and has provided technical assistance to the rights workers on how to handle cases of this nature.

- **Community Sensitization Log**
  This form documents the community sensitization events that rights workers hold in their communities. The form collects information about the topic of the event, how it is implemented, the number of participants and other meeting logistics. Many of the questions have a list of possible responses for the rights workers to choose from.

  The information collected through this form can tell the organization: 1) how many sensitization events were held; 2) what the sensitization topics were; and 3) which sensitization methods attracted the largest audiences. The Land Rights Organization has learned that most sensitization events are rights workers speaking to the community for an average of 15 minutes during other community meetings. The organization is in the process of developing sensitization tools, such as shorter case stories, role plays or handouts, that the rights workers can use in this short timeframe.

TRAINING LOG FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

<table>
<tr><td>Dates:</td><td rowspan="2">Instructor(s):</td><td colspan="2">Topics/Modules Covered (circle):</td></tr>
<tr><td>Location:</td><td rowspan="2">Human Rights
Gender
Constitution in relation to Property Rights
Marriage, Separation and Divorce
Succession and Inheritance
Land Act and Amendments
Land Tenure Systems
Land Administration and Dispute Resolution Institutions</td><td rowspan="2">Landlord and Tenant Rights
Court System
Alternative Dispute Resolution
Advocacy
Monitoring
Networking
Community Entry
Other (specify): ____________</td></tr>
<tr><td>Training Materials:</td><td>Other Staff:</td></tr>
</table>

Demographics								**Attendance**				
Name	**Physical Address**	**Sex**	**Age**	**Marital Status**	**Educ. Level**	**Occupation**	**Village Position**	**Day 1**	**Day 2**	**Day 3**	**Day 4**	**Day 5**
		M F										
		M F										
		M F										
		M F										
		M F										
		M F										
		M F										
		M F										
		M F										
		M F										

Issues raised/Comments: ____

____

____

Recorder Name: ____

TECHNICAL ASSISTANCE LOG FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Month:

Assistance Logistics	Type of Assistance (circle one)	Description of Assistance	Assistance Provided to: (Names)	Outcome of Assistance
Date: Location: TA Primary Provider: Other Staff:	Improving Service Provision Intervening in Difficult Case Monitoring Advocacy Issues with Leaders Networking Other (specify):_______________			
Date: Location: TA Primary Provider: Other Staff:	Improving Service Provision Intervening in Difficult Case Monitoring Advocacy Issues with Leaders Networking Other (specify):_______________			
Date: Location: TA Primary Provider: Other Staff:	Improving Service Provision Intervening in Difficult Case Monitoring Advocacy Issues with Leaders Networking Other (specify):_______________			

CASE LOG FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Rights Worker's Name:

Client Information:

Client Name:	**Village:** **Parish:** **Sub-county:**
Sex: **M** **F**	**Marital Status:**
Age:	**Occupation:**
Education:	**How Heard of Rights Worker:**

Other Party Information:

Other Party (group) Name:	**Village:** **Parish:** **Sub-county:**
Sex: **M** **F**	**Marital Status:**
Age:	**Relationship to Client:**

Type of Case: **If "Other," *specify*:** ___________________________________

Visit Information:

Date	**Duration** (minutes)	**Action Taken** *(if "gave legal advice," "counseling" or "other," **specify**)*	**Outcome** *(if "referred case" or "other," **specify**)*	**Comments**

Marital Status	**Type of Case**		**Action Taken**	**Outcome**
Married (Customary)	*Land boundary dispute*	*Marital problem*	*Gave legal advice (**specify**)*	*Referred cases: (**specify** to whom)*
Married (Civil)	*Eviction by landlord*	*Domestic violence*	*Counseling (**specify**)*	*Examples: Local Council courts, Probation and Welfare Officers, Police (or Family and Protection Unit), Elders, Legal aid clinics, Magistrates court, Administrator General's Office, Sub-county Chief, FIDA, ULA, etc.*
Married (Church)	*Eviction by partner*	*Child abuse/neglect*	*Mediation*	
Married (Muslim)	*Land grabbing*	*Custody*	*Check-up visit only*	
Married (Don't Know)	*Fraudulent sale/claim to land*	*Murder*	*Other (**specify**)*	
Married (Doesn't Specify)	*Sale of land without consent*	*Defilement*	**How Heard of Rights Worker**	
Single	*Trespass*	*Debt*		
Widow	*Other property dispute*	*Theft*	*Poster*	*Scheduled return visit with client*
Divorced/Separated	*Inheritance*	*Property damage*	*Radio show*	*Scheduled meeting with other party*
Cohabiting	*Writing a will*	*Assault/violence*	*Friend/Family*	*Scheduled court date*
	Obtaining land certificate	*Drug/alcohol abuse*	*Local leader*	*Scheduled meeting with LC*
	Obtaining birth/death certificate	*Other (**specify**)*	*Village/Group Meeting*	*Scheduled meeting with other leader*
	Obtaining marriage certificate		*Other (**specify**)*	*Filed legal forms (certificates, wills, etc.)*
				*Memorandum of Understanding (**verbal**)*
				*Memorandum of Understanding (**written**)*
				Resolved – In favor of client
				Resolved – Against client
				(# of people) wrote wills
				Ongoing – no additional visits planned
				*Other (**specify**)*

Prior Help:

Problem of Client (narrative):

MONTHLY CLIENT VISIT LOG FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Rights Worker's Name:

Month:

Date	Client Name	Village, Parish, Sub-county	Sex	Age	Marital Status	Education	Occupation	Type of Case *(if "other," specify)*	Action Taken *(specify if appropriate)*	Outcome *(specify if appropriate)*	How Heard of Rights Worker	Comments
			M F									
			M F									
			M F									
			M F									
			M F									

Marital Status
Married (Customary)
Married (Civil)
Married (Church)
Married (Muslim)
Married (Don't Know)
Married (Doesn't Specify)
Single
Widow
Divorced/Separated
Cohabiting

Type of Case	
Land boundary dispute	*Marital problem*
Eviction by landlord	*Domestic violence*
Eviction by partner	*Child Abuse/neglect*
Land grabbing	*Custody*
Fraudulent sale/claim to land	*Murder*
Sale of land without consent	*Defilement*
Trespass	*Debt*
Other property dispute	*Theft*
Inheritance	*Property damage*
Writing a will	*Assault/violence*
Obtaining land certificate	*Drug/alcohol abuse*
Obtaining birth/death certificate	*Other (**specify**)*
Obtaining marriage certificate	

Action Taken
*Gave legal advice (**specify**)*
*Counseling (**specify**)*
Mediation
Check-up visit only
*Other (**specify**)*

How Heard of Rights Worker
Poster
Radio show
Friend/Family
Local leader
Village/Group Meeting
*Other (**specify**)*

Outcome
*Referred cases: (**specify** to whom)*
Examples: Local Council courts, Probation and Welfare Officers, Police (or Family and Protection Unit), Elders, Legal aid clinics, Magistrates court, Administrator General's Office, Sub-county Chief, FIDA, ULA, etc.
Scheduled return visit with client
Scheduled meeting with other party
Scheduled court date
Scheduled meeting with LC
Scheduled meeting with other leader
Filed legal forms (certificates, wills, etc.)
*Memorandum of Understanding (**verbal**)*
*Memorandum of Understanding (**written**)*
Resolved – In favor of client
Resolved – Against client
(# of people) wrote wills
Ongoing – no additional visits planned
*Other (**specify**)*

COMMUNITY SENSITIZATION LOG FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Rights Worker's Name:

Month:

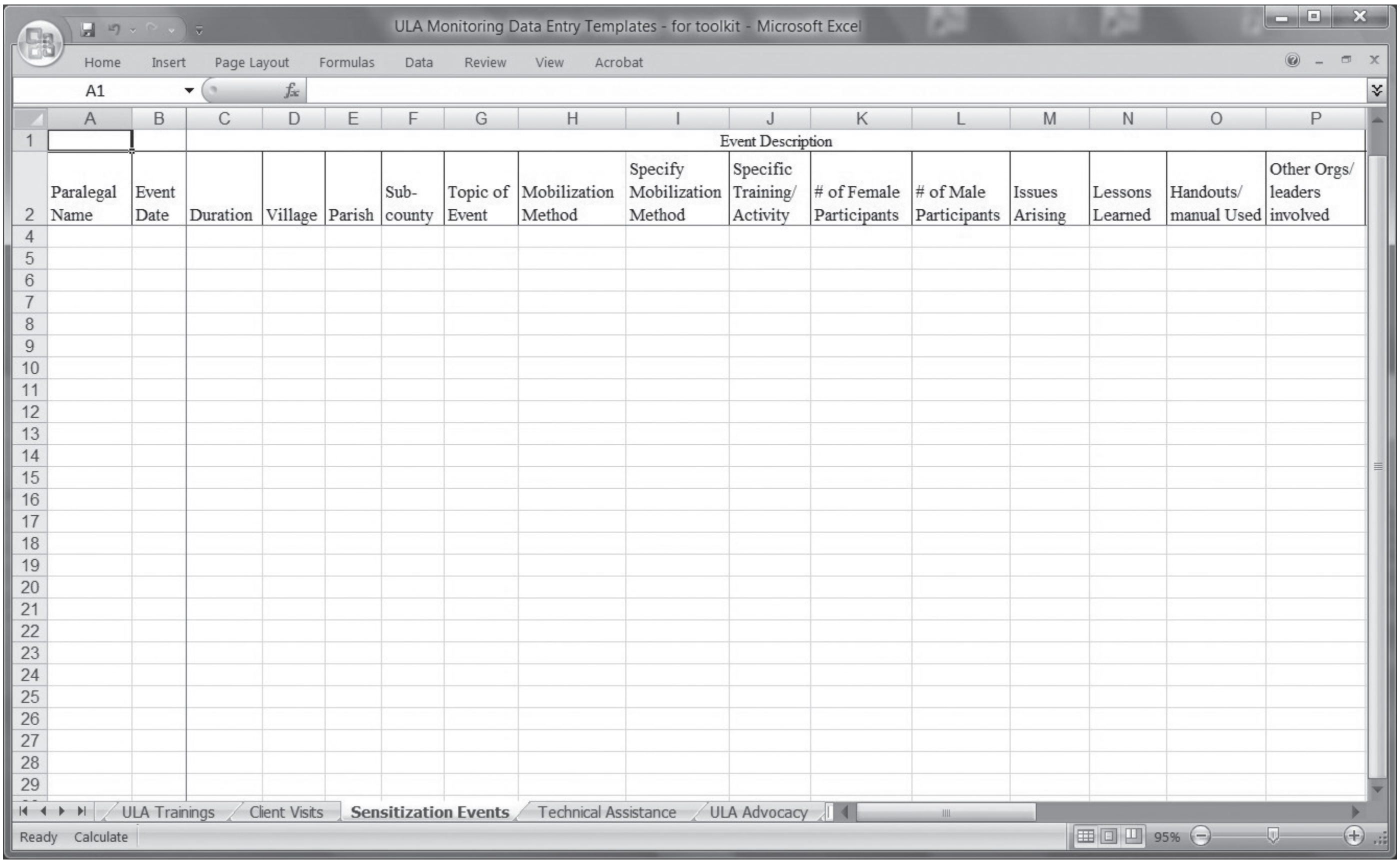
Date	**Duration** (minutes)	**Village, Parish, Sub-county**	**Topic of Event**	**Mobilization Method** *(If "talks at public gathering," **specify**)*	**Specific Training/ Activity** *(all that apply)*	**No. of participants** M	F	**Issues Arising** ***from Participants***	**Lessons *Rights Worker* Learned**	**Other Rights Workers** (name)/ **Organizations** (name)/ **Leaders** (role) **Involved** *(all that apply)*

Topic of Event			**Mobilization Method**	**Training/Activity**	
Marriage, separation and divorce laws	*Land management institutions*	*Court system*	*Open air meetings (**event held by rights worker**)*	*Role play*	*Song*
Historical Uganda Land Law	*Inheritance and succession laws*	*Dispute resolution*	*Talks in school*	*Question and Answer*	*Dances*
Land Act and Amendments	*Land tenure systems*	*Will writing*	*Talk radio*	*Lecture*	*Handouts*
Marriage and property rights	*Human rights*	*Land certificates*	*Talks at public gatherings (**specify group/gathering**)*	*Case stories*	*Other (**specify**)*
Landlord and tenant relations	*Women's rights*	*Other certificates*	*House to house visit*		
New laws and implications	*Children's rights*	*Other (**specify**)*	*Posters (**used to sensitize**)*		
			*Other (**specify**)*		

Step 5: Define the Reporting Procedures (data entry, analysis, reporting)

Monitoring program activities is not helpful unless the information that is collected is actually used to inform program staff and stakeholders. Many organizations reach the stage of completing the forms, but do not think about how they are going to document, analyze and report the information.

Step 5 has two stages. First, the information from the monitoring forms needs to be entered into a statistical program so it can eventually be analyzed and reported. While it is possible to analyze data directly from the monitoring forms, it is very cumbersome and time-consuming to continuously look across forms. An organization should develop a data entry template in Excel or another program of its choosing. The template should resemble the monitoring form as much as possible so that the data entry personnel can easily transfer the data from the form to the spreadsheet. Below is a data entry template for the Land Rights Organization's sensitization events form. Notice that it looks almost exactly like the sensitization event log.



		Event Description													
Paralegal Name	Event Date	Duration	Village	Parish	Sub-county	Topic of Event	Mobilization Method	Specify Mobilization Method	Specific Training/ Activity	# of Female Participants	# of Male Participants	Issues Arising	Lessons Learned	Handouts/ manual Used	Other Orgs/ leaders involved

Storing all the data in a common spreadsheet simplifies the reporting process substantially, allowing for the data to be organized, summarized and analyzed all in one place.

After the data are entered, the organization needs to decide what information it wants to report to each stakeholder. The organization should first use the priority information from Step 3 to answer the key questions listed for each goal in Step 1. Then, the organization can decide which stakeholders should receive the information to achieve a given monitoring goal. For example, if the organization's goal is to identify areas for technical assistance to the rights workers, it may want to use the monitoring data to answer the following questions:

- What are the most common types of cases clients bring to the rights workers?
- What challenges do rights workers experience in providing legal advice and holding sensitization events?
- What questions or issues do participants raise during sensitization events?
- What difficulties do rights workers have in completing and turning in monitoring forms?

Each goal/stakeholder may require different information. The best way to ensure that each stakeholder receives the information that s/he will need to reach the stated goal is to create reporting templates. A ***reporting template*** is a blank table that says what information should be included in the report. When a report needs to be submitted to a stakeholder, the staff can just fill out the reporting template using the monitoring data.

Reporting Findings for Luwero Community Rights Workers Program

The key personnel of the Land Rights Organization met to discuss the important information to report to each stakeholder. The personnel first looked back at their original monitoring goals and key questions to remind themselves what questions they wanted to answer with the monitoring data; they next identified the important stakeholders. Then staff discussed the important information to report to each stakeholder for each goal. For example:

Goal: Improving rights workers programming

The key personnel decided that it is important to report the answers to the following questions they identified in Step 1 to the director of the program so that she could use the information to determine new topics for training, identify areas for technical assistance, and provide appropriate resources to the rights workers to alleviate their challenges:

- What training, resources or assistance do rights workers need?
- What legal action do the rights workers take on different types of cases?
- Who are the clients?
- Which rights workers have the most and fewest cases?
- What types of sensitization events have the highest and lowest participation of women?
- What areas have the highest and lowest number of sensitization events?
- What challenges are the rights workers facing?

The key personnel went through the same exercise for all of their monitoring goals and developed three reporting templates to report the necessary information to the appropriate stakeholders:

- Monthly Report (shown below)
  The program assistant submits a report each month to the project director to give an overall picture of what services the rights workers are providing to their communities. The monthly report template summarizes the rights workers' Case Log reports and, as such, is quite similar to this form.

- Quarterly Report
  Based on the three monthly reports in that quarter, the program assistant submits a report to the project director, the advocacy division director, and the head of the organization to summarize both the rights workers' activities and the Land Rights Organization's activities.

- Final Report to the Funder
  At the end of the program, the Land Rights Organization will report on all the activities that occurred throughout the entire project period to the project donor.

MONTHLY REPORT TEMPLATE FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Client Visits

- Discuss any problems/issues encountered in the client visits this month. Explain why we might be seeing unusually high or low numbers (if applicable).
- Fill out the charts below to provide quantitative information about the client visits.

Total # of rights workers that turned in Client Visit forms	
Total # cases handled this month	

Client Description

	Male	Female	TOTAL
Number of Clients			
Age (List age ranges on new lines)			
Marital Status (List types of marital status on new lines)			
Village (List villages on new lines)			

Types of Cases

Topic of Case	TOTAL # Cases	# Male Clients	# Female Clients
Land boundary dispute			
Eviction by landlord			
Land grabbing			
(List additional types of cases on new lines)			

Actions Taken

Action Taken	TOTAL # Cases	# Male Clients	# Female Clients
Gave Legal Advice			
Counseling			
Mediation			
Check-up visit only			

Outcome of Visit

Outcome	TOTAL # Cases	# Male Clients	# Female Clients
Referred cases			
Scheduled return visit with client			
Scheduled meeting with other party			
(List additional outcomes on new lines)			

MONTHLY REPORT TEMPLATE FOR LUWERO COMMUNITY RIGHTS WORKERS PROGRAM

Sensitization Events

- Discuss any problems/issues encountered and lessons learned in the sensitization events this month. Explain why we might be seeing unusual numbers (if applicable).
- Fill out the charts below to provide quantitative information about the sensitization events.

Total # of rights workers that turned in Sensitization Event forms	
Total # of sensitization events held	

Attendance

	TOTAL	Male Attendance	Female Attendance
Total attendance at all events			
Average attendance per event			

Sensitization Event Description

Topic of Event	Total #	Ave. Males Attend	Ave. Females Attend
Historical Uganda Land Law			
Marriage, Separation and Divorce laws			
Land Act and Amendments			
(List additional topics on new lines)			

Means of Discussion	Total #	Ave. Males Attend	Ave. Females Attend
Role Play			
Question and Answer Session			
Lecture			
(List additional means on new lines)			

Method of Discussion	Total #	Ave. Males Attend	Ave. Females Attend
Open air meeting			
Talks at public gatherings			
(List additional methods on new lines)			

Step 6: Create Monitoring Implementation Plan (timing, roles and responsibilities)

A monitoring implementation plan is a physical document that details how monitoring will be implemented. It specifies the information to be tracked and reported, the flow of information from the field to the organization, and the roles and responsibilities of all parties involved.

After completing Steps 1-5, the organization has all the necessary tools to create a monitoring system: the monitoring forms, data entry screen and reporting templates. However, the tools by themselves cannot produce a functioning monitoring system. In the last step, the organization needs to plan how these monitoring tools will be implemented. If the staff do not have a clear idea of timing, roles and responsibilities, the tools will not be used appropriately. As explained before, the monitoring implementation plan should answer the "who," "what," "when," "where" and "how" of the information flow from the field to the important stakeholders.

The monitoring implementation plan should answer:

- What information will be collected in the monitoring system?
- What forms will be used to collect the information?
- Who will train staff on how to use the monitoring form?
- Who will collect the information on each monitoring form?
- How often will each monitoring form be completed?
- How will the monitoring forms be submitted and to whom?
- Who will check the monitoring forms to make sure they are filled in correctly?
- Who will enter the data into the computer?
- How often will they enter the data?
- Who will check that the data are entered correctly?
- Who will analyze and report the data through each of the report templates?
- When will reports be submitted and to whom?

A strong monitoring implementation plan:

- Includes the answers to all of the questions above
- Is simple and clear enough that all staff can understand it
- Takes into account constraints of the staff and rights workers—for example, many rights workers live in remote areas, and may have trouble turning in the monitoring forms on a regular basis. Be sure to account for this when determining how the rights workers will turn in the forms.

Once the monitoring implementation plan is finished, discuss the plan with all relevant staff to make sure that everyone knows his/her roles and responsibilities for the monitoring.

The examples below describe how the Land Rights Organization went about creating its monitoring implementation plan. Samples of the three forms they developed and are using can be found on the pages that follow. These examples are not forms to be filled out but guides for what information needs to appear in a monitoring plan.

Monitoring Implementation Plan for Luwero Community Rights Workers Program

The key personnel from the Land Rights Organization met to discuss how the different monitoring tools should be implemented. They answered all of the relevant questions listed above and documented the results in a monitoring implementation plan.

The organization developed their monitoring implementation plan with three parts:

- **Narrative**
  The narrative section provides an overall picture of how the monitoring will be implemented, describes the general roles and responsibilities of staff, outlines the monitoring forms that will be used, and describes what types of reports will be compiled. This section is intended to provide a summary of the process. The other two sections are much more detailed.
- **Monitoring Plan Matrix**
  This chart is the core of the monitoring implementation plan. It details how the priority information identified in Step 3 will move from the field to the key stakeholders. The chart lists the activities to be implemented through the program, the information to be reported about each activity and how the information will be collected. It also provides a short narrative of how the data will be reported that specifies which report template will be used, how often the report will be submitted, which key stakeholders will receive the report and who is responsible for the reporting process.
- **Monitoring Form Matrix**
  This chart describes the implementation of all the monitoring forms, including the roles and responsibilities of staff in filling them out, entering the information into the database, reporting the relevant data and ensuring quality of the entire process.

Monitoring Implementation Plan for Luwero Community Rights Workers Program

Narrative: Overview of monitoring implementation plan

This monitoring implementation plan is focused on how the organization will implement the monitoring and report on their activities. However, for this project, there are two levels of monitoring. The first is to document the organization's project activities to improve their program and replicate successes. The second is to establish a simplified version of the monitoring, so the rights workers themselves can continue monitoring once they become an independent organization. The development of a monitoring implementation plan for the rights workers organizations will, therefore, be one of the organization's technical assistance tasks. The organization will receive feedback from the community rights workers on the monitoring, work with them to prioritize the most important indicators to collect, simplify the rights worker forms (Client Visit, Community Sensitization), teach them how to use Excel or the best way to document and analyze information, and provide guidance on how to use the information they collect. The Program Assistant will also help with any problems the rights workers have in completing the forms during technical assistance meetings.

The Program Assistant is in charge of implementing the monitoring for the organization, troubleshooting any issues and reporting on the data. Monitoring information will be transferred from the field to the organization through four logs. All logs will be submitted to or filled out by the Program Assistant, who will enter the data and report on the findings. The Program Assistant will train the rights workers and the organization's staff how to fill out the forms.

The right workers will collect monitoring information through two logs:

- *Monthly Client Visit Log/Case Log (kept with community rights worker)*
- *Community Sensitization Log*

The organization's staff (specific staff specified in matrix below) will collect monitoring information through two logs:

- *Training Log*
- *Technical Assistance Log*

The monitoring data will flow from the field to the Land Rights Organization and ultimately to the donor through the following main reports:

- MONTHLY REPORT
  For the first few months of the program, the Program Assistant submits a MONTHLY REPORT to the Program Director. This report is based on the rights workers' logs and any issues that arose in that month.

- QUARTERLY REPORT
  The Program Assistant summarizes the MONTHLY REPORTS and will submit the summary to the Program Director and the director of the organization.

- FINAL REPORT
  The organization's staff will prepare this report for the funder at the end of the project. It will include a summary of the findings in all MONTHLY and QUARTERLY REPORTS throughout the project period and additional commentary on the monitoring. While the QUARTERLY REPORTS will probably continue after the project, the FINAL REPORT is a one-time report to give the funder an overall picture of the project and feedback on the monitoring.

Monitoring Plan Matrix for Luwero Community Rights Workers Program

Activity	Indicators to be tracked and reported	How info. is collected	Who collects information	How/when information is reported	Responsible for reporting
Client Visits	# cases rights workers handle Topics of cases Actions taken Outcome of cases/ # successful cases Duration of case Beneficiaries demographics (sex, age, village) Challenges of rights workers	*Monthly Client Visit Log/Case Logs*	Rights Workers	Rights workers turn in Monthly Client Visit Log on the 15th of each month to their local representative on the executive board. Forms will be combined during the executive meeting each month. Program Assistant collects forms from chairperson at the executive meeting each month, enters data as soon as possible, and reports in MONTHLY REPORT and QUARTERLY REPORT to Program Director. Program Director reviews and sends issues to relevant departments, submits to director and uses information for FINAL REPORT to funder.	Program Assistant and Program Director
Sensitization Events	# of community sensitizations events held Logistics of events (locations, dates, duration, etc.) Topics of events Method of sensitization Mobilization method # men/women attending events Organizations/leaders involved Challenges of rights workers	*Community Sensitization Log*	Rights Workers	Rights workers turn in form on the 15th of each month to their local representative on the executive board. Forms will be combined during the executive meeting each month. Program Assistant collects forms from chairperson at the executive meeting each month, enters data as soon as possible, and reports in MONTHLY REPORT and QUARTERLY REPORT to Program Director. Program Director reviews and sends issues to relevant departments, submits to director and uses information for FINAL REPORT to donor.	Program Assistant and Program Director
Community Rights Workers' Training	# trainings Logistics of trainings (date, duration, location, name of trainers) Topics of training # of rights workers (men/women) trained Rights workers' demographics (name, age, village, marital status, occupation, leadership role)	*Training Log*	Program Assistant	Program Assistant completes the form during training, enters data as soon as possible and reports in the next QUARTERLY REPORT to Program Director. Program Director checks, sends issues to relevant departments, and submits to director and uses information for FINAL REPORT to funder.	Program Assistant and Program Director
Technical Assistance to Rights Workers	# of assistance meetings Type of assistance Logistics of assistance (date, duration, location, name of provider, etc.) # men/women receiving assistance Description of assistance Findings/outcomes of assistance	*Technical Assistance Log*	Technical Assistance Provider	Technical Assistance Provider submits forms to Program Assistant, who enters data as soon as possible and reports in QUARTERLY REPORT to Program Director. Program Director checks and submits to organization director and uses to complete FINAL REPORT to donor.	Program Assistant and Program Director

Monitoring Form Matrix for Luwero Community Rights Workers Program

Name of Form/Special Report	Who fills it out?	Who trains/ explains how to fill out?	When is it filled out?	What happens to the form after it is filled out?	Who checks quality of information/how they check?	How is this information reported up?	What are the data entry needs?	Checking quality of data
Land Rights Org. Logs								
Training Log	Lead Trainer/ Program Assistant	Program Assistant	At each training	Submitted to Program Assistant after training and filed at office	Program Assistant checks form and asks trainer for any additional clarification if necessary	Program Assistant collects after training, enters data and reports in MONTHLY REPORT. Program Director reports in QUARTERLY REPORT and FINAL REPORT.	All data are entered into two databases: Trained Rights Workers and Trainings	The director of the research division will check once every quarter
Technical Assistance Log	Lead Technical Assistance provider	Program Assistant	At each technical assistance meeting	Submitted to Program Assistant and filed at office	Program Assistant checks form after receipt and asks TA provider for any additional clarification if necessary	Program Assistant collects after TA visit, enters data and reports in MONTHLY REPORT. Program Director reports in QUARTERLY REPORT and FINAL REPORT.	All information entered into database: Technical Assistance	The director of the research division will check once every quarter
Community Rights Workers' Logs								
Monthly Client Visit Log/Case Log	Rights Workers	Program Assistant	Case logs – During and directly following meeting with client Monthly logs – transferred from case logs before submission	Case logs kept by Rights Workers Monthly Client Visit Logs collected by Program Assistant and filed at office	Program Assistant. Checks after receipt and fills in additional columns in data entry template to document problems. Provides TA to rights workers who are having problems.	Submitted to regional representative in executive team each month. Collected by Program Assistant at monthly executive meeting, entered into database, and reported in MONTLY REPORT, QUARTERLY REPORT, and FINAL REPORT.	All data entered into database: Client Visits	The director of the research division will check once every quarter
Community Sensitization Log	Rights Workers	Program Assistant	During and directly following community sensitization event	Collected by Program Assistant and filed at office	Program Assistant checks after receipt and fills in additional columns in data entry template to document problems. Provides TA to rights workers who are having problems.	Submitted to regional representative in executive team each month. Collected by Program Assistant at monthly executive meeting, entered into database, and reported in MONTLY REPORT, QUARTERLY REPORT, and FINAL REPORT.	All data entered into database: Community Sensitization Log	The director of the research division will check once every quarter

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