

CBM Quick Process Reference Guide (QPRG)

for Evaluation and Learning in CBM Programme Work

Process description

1. Purpose of process

Ensuring management of highly efficient and effective evaluations that create evidence for accountability, communication, and improvement.

2. Introduction and Scope

- **Evaluation** is a dedicated activity at a specified time of a project/programme or thematic and strategic plan.
- The assessment includes relevance/appropriateness, coherence, coverage, effectiveness, efficiency, sustainability/connectedness, impact, and disability inclusion and safeguarding. These criteria shall be prioritised according to the purpose of the evaluation and the availability of respective data and resources.
- Evaluations should be carried out according to internationally agreed evaluation standards [qualitystandards.pdf \(oecd.org\)](#).
- This standard process applies to all types of evaluations, as well as for baseline and feasibility studies.
- Managing an evaluation includes taking charge of all process steps as outlined below, incl. the contracting process.

3. Key stakeholders in the process

Country Offices	Managing project and country plan evaluations
Initiatives - Advisors and Programme Managers	Providing guidance for evaluation of the technical components. Managing thematic/Initiative evaluations.
Institutional Donor and Philanthropy	Planning evaluation and budget in project development, providing guidance on donor requirements.
Partner Organisation	Providing input to evaluations (TORs, Evaluation Questions), supporting logistics (meetings, document sharing). Managing evaluations of free fund projects.

4. Key process principles and considerations

- All evaluations must be carried out within the standards set out in the CBM Evaluation Policy.
- It is at the discretion of CBM entities to decide on the need for any other evaluation.
- The responsibility and lead of a CBM evaluation lies with the CBM entity that initiated and contracted it.
- For Free Fund Projects CBM's Partner Organisation leads the process and must involve the related CBM entity in all critical steps, esp. in TOR development, procurement and selection of consultant, and final report approval.

- Partner Organisations shall adhere to CBM's evaluation standards. They shall be encouraged to use the CBM tools and templates as much as feasible to ensure a structured approach and compliance with CBM Standards. The respective Country Office is responsible to support and supervise the partner accordingly.
- Related documents, in particular final reports, shall be in an accessible format and shall adhere to CBM Brand Guidelines. Partners shall at a minimum include the CBM Christian Blind Mission logo in their documents/reports and indicate CBM as the funding organisation.
- Documentation of the evaluation preparation process, tendering, selection of evaluators, contractual agreements, learnings etc to be captured in ProMIS Project page Log tab or filed in the Project Document library.
- Evaluation TOR, Final Report and Management Response to be uploaded in ProMIS Project Document library.
- The Management Response Action Plan to be manually entered in ProMIS Project page Tasks tab and Tasks pushed to the Project Cycle workflow.
- All key tools, processes, resources, and focal points/contact persons are available [here in ProMIS Resource Library](#).

5. Specific Situations

- For Legally Contracted Designated Funding (LCDF) project donor requirements may replace CBM standards.

6. Minimum Requirements

- All projects with a total funding volume between 500,000 and 1 million Euros must undergo at least one external evaluation.
- All projects with a total funding volume above 1 million Euros must undergo a mid-term and a final external evaluation.

7. Detailed process step and responsibilities

Note: The process can be adjusted to align with any deviating donor requirements, provided that related CBM entities agree (3-way-working method).

Key process	Detailed process steps	Who/participants & stakeholders	When/Timing	Tools
Planning Evaluation	Budgeting and scheduling of evaluations in project, programme, Country Office (CO) plan, Regional Hub (RH) plan, Initiative plan	CBM entities that develop projects, programmes, and plans	At Planning Stage	Project Plan, budget, and schedule
Preparation of Data for Evaluation	Continuous collection of background material and project data. Ensuring of data security standards. Data shared with external persons/consultants to be provided on a dedicated and secure SharePoint site	Related CBM implementing entities and Partners	Throughout project implementation and before contract signature with the consultant	Data Base/ ProMIS Project Document Library
Terms of Reference	Drafting of TOR for approval by related management level.	Free Fund Project Evaluations: in all below steps Partner leads and must involve related CBM entity.	Latest 3 months before evaluation start date	TOR and Budget Template for Evaluations; Feasibility Study TOR; Authority Matrix
Tendering	Tendering: publish TOR in newspapers, online and existing networks (procurement guidelines apply). Documentation of process, incl. publication, and emails with offers in ProMIS Project's Document Library.	CO to support Partner in involving CBM appropriately and ensure compliance with CBM Standards.	Allow 2-4 weeks for submission of offers	Applicable CBM/Donor/ National Procurement Guideline

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Selection of Evaluator(s)	<p>Assessment of offers/expressions of interest by at least 2 (better 3) persons independently. Selection based on pre-defined criteria. Optional interviews with shortlisted candidates.</p> <p>Document the selection of evaluators in the Project page Documents tab library in ProMIS.</p>	All others: contracting CBM entity leads.	Within 5-10 working days after deadline and "opening" of offer letters/emails	Assessing Consultancy Offers Matrix
Contracting	<p>Informing successful candidate and signature of consultancy contract by contracting entity and consultant.</p> <p>Inclusion of Code of Conduct, Safeguarding Declaration, consent templates, provisions on data security and anonymity.</p> <p>Informing unsuccessful candidate.</p> <p>Document in the Project Document Library in ProMIS.</p>		Max. 5 days after selection	CBM or National Standard Contract for Service Providers plus annexes
Inception Payment	<p>First payment to consultant (20-50% depending on local practice) based on contractual agreement and receipt of consultant's invoice.</p> <p>Invoices to be uploaded in the ProMIS project page Document library.</p>			

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Management of Evaluation	<p>Support to consultants with logistics, contacts, and accessibility/ reasonable accommodation during process.</p> <p>Ensure regular upload of data collected, reports etc. into the dedicated and secure SharePoint site (Implementation and finalization by consultant).</p> <p>Support organisation of/participation in a wrap-up Workshop with partners and consultants.</p> <p>Submission of (draft) evaluation report by consultant. Upload of draft report to project site in ProMIS for revision/approval loops.</p>	Contracting entity	As per contract agreement: after Contract Signature or after receipt of inception report	<p>Inception Report template;</p> <p>Invoice in conformity with CBM/National requirements</p>
Completion of contractual obligations	<p>Assessment of content and quality of draft evaluation report; request consultant for revision of draft report and submission of amended final report (as needed);</p> <p>Approval of final report and all deliverables as per contract/TOR in ProMIS and process final payment.</p>	Contracting entity	<p>As set out in agreed evaluation schedule;</p> <p>Report due as agreed with contracting entity, max. 4 weeks after field/data collection phase;</p> <p>Comments max. 2 weeks after receipt of draft report</p> <p>Final Approval max. 2 weeks after receipt of final report.</p>	<p>Evaluation Report template</p> <p>Quality Review template</p>

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Final Payment	Final payment to consultant (50-80%) based on contractual agreement, approval of final report and consultant's invoice	Contracting CBM entity. Free Funds: Partner and CBM	Upon final approval of all deliverables	Invoice in conformity with CBM/National requirements
Management Response	Mandatory preparation of Management Response/Action Plan based on recommendations of evaluation. Agreed actions of the Management Response to be manually entered in the project page Tasks tab. Monitoring of implementation of agreed actions.	Project Evaluations: Partner jointly with CBM. Thematic Evaluations: Initiative.	Max. 4 weeks after receipt of final report; Monitoring throughout implementation	Management Response template
Documenting	Upload of approved documents: TOR, Final Report and Management Response into ProMIS project's document library. Document the lessons learnt/promising practices in the respective project's Log tab and upload any final documents in ProMIS Document library.	CBM entity	As soon as possible after completion; Build-in of resources (budget/time) and schedule during Country Planning	ProMIS (Project Workflow Cycle, Tasks Tab, Log Tab)
Learning and Reflection	Planning and budgeting for learning and reflection activities (regular meetings with partners; workshops etc.)	CBM entity (CO or Initiative); or partner	After completion of evaluation or at regular intervals for several evaluations, e.g., every 3-6 months	Possible formats include workshops, online sessions, posters, summaries;

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	Identification and sharing of selected evaluation reports/summaries that can be published on the CBM official website.	CBM contracting entity	Regularly, every 3-6 months	Template for Eval. Summaries (Comms Dept.)

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Date of approval: May 2022

Last revised: 31 May 2023

Version: 02