

M&E DATA COLLECTION TOOL

The Monitoring & Evaluation (M&E) tool, developed by the Citizens Economic Empowerment Commission, is designed to systematically collect data and assess the performance of CEEC-funded projects. This user-friendly tool supports data collection, performance assessment, impact analysis, and decision-making with real-time reporting, customizable indicators, and robust data integrity. By enhancing accountability, improving project outcomes, and engaging stakeholders, the tool ensures effective monitoring and evaluation, contributing to sustainable economic development and empowerment.

FIRST OR RETURN VISIT?

Since CEEC started using Kobo Toolbox as it's M&E data collection tool

- ☐ First Visit
- ☐ Return Visit

NAME OF INTERVIEWER

- | | | |
|--|--|--|
| <input type="radio"/> Walusungu Banda | <input type="radio"/> Muyaloka David | <input type="radio"/> Juvensio Phiri |
| <input type="radio"/> Luyando Mukenge | <input type="radio"/> Brian Mwiinga | <input type="radio"/> Nkeemena Syamupa |
| <input type="radio"/> Dorothy Banda | <input type="radio"/> Enita Nawa-Machichi | <input type="radio"/> Dennis Mbetela |
| <input type="radio"/> Caroline Kalombe | <input type="radio"/> Kapampa Mwandila | <input type="radio"/> Nicholas Mulambia |
| <input type="radio"/> Nchimunya Hamasaka | <input type="radio"/> Peter Chala | <input type="radio"/> Matimba Choongo |
| <input type="radio"/> Ketty Bwalya | <input type="radio"/> Eyatta S Chipepo | <input type="radio"/> Bwalya Phiri |
| <input type="radio"/> Penelope Lyempe | <input type="radio"/> Lawrence Maangwe | <input type="radio"/> Humphrey Chisenena |
| <input type="radio"/> Nthenje Zulu | <input type="radio"/> Winfridah Mubiana | <input type="radio"/> David Nkoma |
| <input type="radio"/> Elasto Mwanza | <input type="radio"/> Mutale Masongo | <input type="radio"/> Mwazangi Chanda |
| <input type="radio"/> Chewe Mwamba | <input type="radio"/> Musakanya Chanda | <input type="radio"/> Mtonga Isaac |
| <input type="radio"/> Malala Machenje | <input type="radio"/> Mashebe Muyenga | <input type="radio"/> Kundananji Nawanzi |
| <input type="radio"/> John Mwanza | <input type="radio"/> Christopher A. Malambo | <input type="radio"/> Kaela Changufu |
| <input type="radio"/> Vinandi Musumba | <input type="radio"/> Wellington Kapobe | <input type="radio"/> Nkole James |
| <input type="radio"/> Kasongo Kutasha | <input type="radio"/> Wamundila Mulima | <input type="radio"/> Edith Mwanza |
| <input type="radio"/> Wilbase Tembo | <input type="radio"/> Beenzu Simuyambala | <input type="radio"/> Daniel Kasongo |
| <input type="radio"/> Matthew Kaonga | | |

LOCATION-REGIONS

PROVINCE

- ☐ Central
- ☐ Copperbelt
- ☐ Eastern
- ☐ Luapula
- ☐ Lusaka
- ☐ Muchinga
- ☐ Northern
- ☐ North-Western
- ☐ Southern
- ☐ Western

DISTRICT

CONSTITUENCY

WHAT SOCIAL DISTRIBUTION IS THE BUSINESS

- ☐ Youth
- ☐ Women
- ☐ Men
- ☐ Persons with Disability

PROJECT NAME

IS YOUR BUSINESS FORMALLY REGISTERED

If Business is registred ask client for registration certificates

- ☐ Yes
- ☐ No

WHICH STATUTORY BODIES IS YOUR BUSINESS REGISTERED WITH?

- ☐ Patents and Companies Registration Agency(PACRA)
- ☐ Zambia Revenue Authority (ZRA)
- ☐ National Pension Scheme Authority (NAPSA)
- ☐ Workers' Compensation Fund Control Board
- ☐ National Health Insurance Management Authority(NHIMA)

WHAT TYPE OF REGISTRATION IS YOUR BUSINESS

- ☐ Sole Proprietor
- ☐ Cooperative
- ☐ Private Limited
- ☐ Public Limited

WHY IS YOUR BUSINESS NOT REGISTRED?

WHAT WAS THE STATE OF THE BUSINESS AT THE TIME OF ACQUARING THE LOAN/GRANT

- ☐ Start Up
- ☐ Existing Business

PROJECT LOCATION

GPS (COORDINATES)

latitude (x.y °)

longitude (x.y °)

altitude (m)

accuracy (m)

**DATE OF VISIT**

yyyy-mm-dd

PROMOTER'S NAME

ACTIVE PHONE NUMBER

NEXT OF KIN/AUTHORISED REPRESENTATIVE - PHONE NUMBER

WHAT TYPE OF SERVICE/PRODUCT DID YOU RECIEVE?

- ☐ Loan
- ☐ Grant
- ☐ Both Loan and Grant

WHAT FACILITY DO YOUR BUSINESS USE TO MANAGE YOUR FINANCES

- ☐ Bank
- ☐ Mobile Money
- ☐ Both Bank and Mobile Money

DO YOU HAVE A BUSINESS BANK ACCOUNT?

Separate account in which business transactions are processed

- ☐ Yes
- ☐ No

WHY DON'T YOU HAVE A BUSINESS BANK ACCOUNT?

DO YOU USE YOUR PERSONAL BANK ACCOUNT FOR BUSINESS TRANSACTIONS?

- ☐ Yes
- ☐ No
- ☐ Sometimes

WHICH BANK DOES YOUR BUSINESS BANK WITH?

- ☐ Access Bank
- ☐ Stanbic Bank
- ☐ ABSA Bank Zambia
- ☐ ZANACO
- ☐ INDO-Zambia Bank
- ☐ Citibank Zambia
- ☐ AB Bank Zambia
- ☐ Standard Chartered Bank Zambia
- ☐ First National Bank of Zambia (FNB)
- ☐ United Bank for Africa Zambia (UBA)
- ☐ Zambia National Commercial Bank (ZANACO)
- ☐ First Capital Bank Zambia
- ☐ Ecobank Zambia
- ☐ Zambia Industrial Commercial Bank
- ☐ First Alliance Bank Zambia
- ☐ NATSAVE

WHICH MOBILE MONEY DOES YOUR BUSINESS USE TO MANAGE FINANCES?

- ☐ MTN Mobile Money
- ☐ Airtel Mobile Money
- ☐ Zamtel Mobile Money

HOW MUCH MONEY WAS DISBURSED FROM (ZMW)

WHEN WAS THE AMOUNT DISBURSED?

yyyy-mm-dd

PURPOSE OF LOAN/GRANT

EMPOWERMENT PRODUCT - LOANS

- ☐ Energy Loan Product
- ☐ Aquaculture Loan Product for Cage Farming
- ☐ Tourism Loan Product
- ☐ Trade Finance including Working Capital
- ☐ Loan Product for Marketeer Co-operatives with a focus on Bulking, Cold Storage and Processing facilities
- ☐ Marketeer Booster Loan for Individuals
- ☐ Industrial Yards
- ☐ Agricultural Mechanization Loan Product
- ☐ Agro-Processing Loan Product
- ☐ Light Manufacturing Loan Product
- ☐ Graduate Loan Product
- ☐ Livestock Out grower Scheme for Beef, Dairy
- ☐ Mining Loan Product
- ☐ Construction and Infrastructure Loan Product
- ☐ Own a Taxi and Minibus Loan Product
- ☐ Auto Mechanics
- ☐ Aquaculture Seed Fund (ASF)
- ☐ ICT, Innovation and Creative Arts
- ☐ Busulu Loan Product
- ☐ Solar Yaka Loan Product

EMPOWERMENT PRODUCT - GRANTS

- ☐ Annual Presidential Awards
- ☐ Cashew Infrastructure Development Matching Grant

IS THE BUSINESS CURRENTLY OPERATIONAL?

- ☐ Fully Operational
- ☐ Partially Operational
- ☐ Not Operational

BUSINESS NEW ENTRANTS

HAS YOUR BUSINESS ATTAINED ANY OF THE FOLLOWING AFTER THE CEEC LOAN

New Products☐ Yes☐ No**Specify?***What new product(s)*

New Services☐ Yes☐ No**Specify***What new service(s)*

New Contracts☐ Yes☐ No**Specify***What new contract(s)*

New Markets☐ Yes☐ No**Specify***What new market(s)*

WHY IS YOUR BUSINESS NOT OPERATIONAL?

TYPE OR NATURE OF BUSINESS

CASHEW

CASHEW

- ☐ Cashew Production
- ☐ Cashew Processing
- ☐ Cashew Storage and Handling
- ☐ Cashew Marketing
- ☐ Cashew Feasibility Study
- ☐ Cashew Transportation
- ☐ Cashew Integrated Processing and Production

» CASHEW PRODUCTION

CASHEW PRODUCTION

Number of trees planted

Number of trees surviving

Reasons for mortality

» CASHEW PROCESSING

CASHEW PROCESSING

Production Capacity of Machinery

Targeted Production

Actual Production

Reason for Variation

» CASHEW STORAGE AND HANDLINGCASHEW STORAGE AND HANDLING

Storage Capacity of Building

Actual Storage*Avarage*

Reason for Variation

» CASHEW MARKETINGCASHEW MARKETING

Targeted Sales

Actual Sales

Reason for Variation

» CASHEW TRANSPORTATIONCASHEW TRANSPORTATION

Number of Cashew Transportation Vehicles Available

Number of Cashew Transportation trips undertaken

Comment(s)

» CASHEW FEASIBILITY STUDYCASHEW FEASIBILITY STUDY

Has the feasibility Study been conducted?☐ Yes☐ No**Who conducted the feasibility Study**

When was the feasibility study conducted?yyyy-mm-dd

Who did you disseminate findings and recommendations

Why hasn't the feasibility study been conducted

WHAT IS YOUR BUSINESS PRODUCTION CAPACITY PER QUARTER?

PROJECT FINANCEPROJECT FINANCE

How much in total did the project cost

How much did you contribute to this project

IMPLEMENTATION STATUS

IMPLEMENTATION STATUS OF THE PROJECT OR BUSINESS

In line with Client's Implementation Plan

Completion Level (%)

Remaining works (%)

Estimated duration of remaining works in months

Do you have enough resources available to complete the Business or Project?

☐ Yes

☐ No

What is your plan to complete the remaining part of the Business or Project?

WHAT IS YOUR COMMENT(S) AS AN OFFICER ON THE IMPLEMENTATION PLAN:

TYPE OF EMPLOYMENT

TYPE OF EMPLOYMENT

SOCIAL DISTRIBUTION

» PERMANENT EMPLOYMENT

PERMANENT EMPLOYED

YOUTHS

BEFORE LOAN - MALE YOUTHS

BEFORE LOAN - FEMALE YOUTHS

AFTER LOAN - MALE YOUTHS

AFTER LOAN - FEMALE YOUTHS

WOMEN

BEFORE LOAN - WOMEN

AFTER LOAN - WOMEN

MEN

BEFORE LOAN - MEN

AFTER LOAN - MEN

PERSONS WITH DISABILITIES

BEFORE LOAN - DISABLED YOUTH MALE

BEFORE LOAN - DISABLED YOUTH FEMALE

BEFORE LOAN - DISABLED MEN

BEFORE LOAN - DISABLED WOMEN

AFTER LOAN - DISABLED YOUTH MALE

AFTER LOAN - DISABLED YOUTH FEMALE

AFTER LOAN - DISABLED MEN

AFTER LOAN - DISABLED WOMEN

» SEASONAL EMPLOYMENT

SEASONAL EMPLOYMENT

BEFORE LOAN - YOUTHS

AFTER LOAN - YOUTHS

BEFORE LOAN - WOMEN

AFTER LOAN - WOMEN

BEFORE LOAN - MALE

AFTER LOAN - MALE

BEFORE LOAN - DISABLED

AFTER LOAN - DISABLED

» TEMPORARY EMPLOYMENT

TEMPORARY EMPLOYMENT

BEFORE LOAN - YOUTHS

AFTER LOAN - YOUTHS

BEFORE LOAN - WOMEN

AFTER LOAN - WOMEN

BEFORE LOAN - MALE

AFTER LOAN - MALE

BEFORE LOAN - DISABLED

AFTER LOAN - DISABLED

CAPACITY BUILDING**HAVE YOU RECEIVED ANY BUSINESS TRAINING?**

- ☐ Yes
- ☐ No

WHAT KIND OF BUSINESS TRAINING HAVE YOU RECEIVED?

- ☐ Financial Management
- ☐ Entrepreneurship(Business Management)
- ☐ Human Resources Management
- ☐ Skills Development
- ☐ Digital Financial Services
- ☐ Other

Specify

WHAT TYPE OF TRAINING WOULD YOU LIKE TO RECEIVE?

- ☐ Financial Management
- ☐ Entrepreneurship
- ☐ Skills Training
- ☐ Technical Assurance
- ☐ Operations Management
- ☐ Quality Assurance
- ☐ Other

Specify

CORPORATE SOCIAL RESPONSIBILITY**DOES YOUR BUSINESS CONTRIBUTE TO THE SOCIAL NEEDS OF YOUR COMMUNITY?***CORPORATE SOCIAL RESPONSIBILITIES(CSR)*

- ☐ Yes
- ☐ No

HOW DOES YOUR BUSINESS CONTRIBUTE TO THE NEEDS OF YOUR COMMUNITY?

- ☐ Support the Vulnerable
- ☐ Community Services
- ☐ Other

Specify**FINANCIAL ANALYSIS**

FINANCIAL ANALYSIS

REVENUE PER QUARTER (ZMW)

COSTS PER QUARTER (ZMW)

ARE YOU UPTO DATE WITH YOUR LOAN REPAYMENT PLAN

- ☐ Yes
- ☐ No

WHEN WAS YOUR LAST REPAYMENT INSTALMENT?

yyyy-mm-dd

WHY ARE YOU NOT UPTO DATE WITH YOUR LOAN REPAYMENT?

BUSINESS CHALLENGES AND MITIGATION

BUSINESS CHALLENGES AND MITIGATION

WHAT ARE THE MAJOR CHALLENGES YOUR BUSINESS IS FACING AND HOW ARE YOU PLANNING TO MITIGATE THEM?

Challenge 1

Mitigation 1

Challenge 2

Mitigation 2

Challenge 3

Mitigation 3

Challenge 4

Mitigation 4

Challenge 5

Mitigation 5

RECOMMENDATIONS

PROJECT IN PICTURES (Where possible contrast between Previous and Current Visit) High Definition (HD) Photos (Landscape Photos are highly recommended)**IMAGE 1**

Click here to upload file. (< 10MB)

IMAGE 2

Click here to upload file. (< 10MB)

IMAGE 3

Click here to upload file. (< 10MB)

IMAGE 4

Click here to upload file. (< 10MB)

IMAGE 5

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PROJECT FILES**FILE 1 - PACRA REGISTRATION CERTIFICATE**

Click here to upload file. (< 10MB)

FILE 2 - TAX CLEARANCE CERTIFICATE

Click here to upload file. (< 10MB)

FILE 3 - LATEST BANK STATEMENT

Click here to upload file. (< 10MB)

FILE 4 - BALANCE SHEET

Click here to upload file. (< 10MB)

FILE 5 - CASH BOOK

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FILE 6

Click here to upload file. (< 10MB)

FILE 7

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