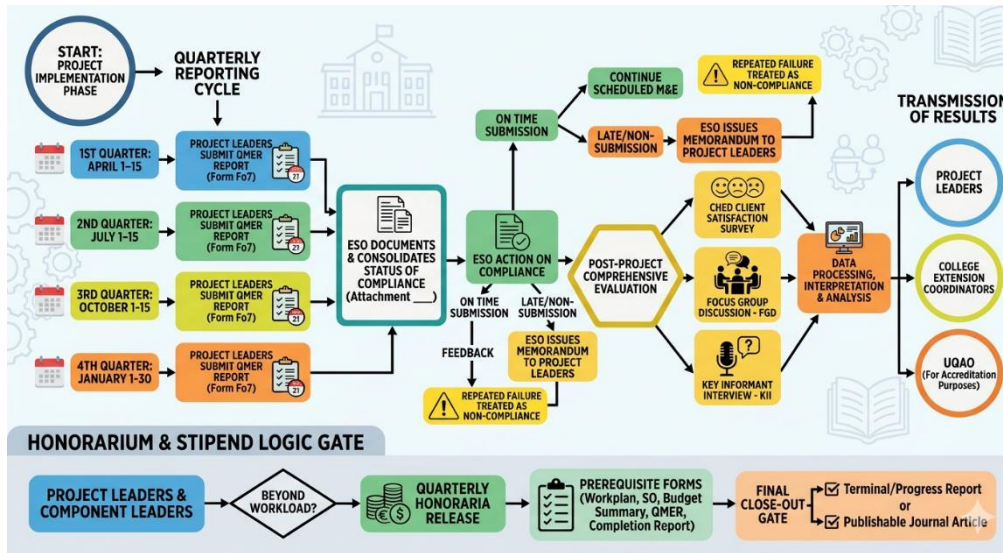


## B.10. Copy of the monitoring and evaluation instruments.

This diagram illustrates the sequential workflow of monitoring (during implementation) and comprehensive evaluation (post-implementation), as detailed in sections 6.8.1 through 6.8.6 of the Community Engagement Procedure.



The Extension Services Office (ESO) holds the primary mandate for overseeing project implementation. To maintain institutional standards, Project Leaders are required to submit a Quarterly Monitoring and Evaluation Report (QMER) using the prescribed university form. These reports

serve as the official record of project milestones and are consolidated by the ESO to track university-wide extension progress.

Compliance is governed by a strict quarterly schedule to ensure deliverables remain on track:

- First Quarter: April 1–15
- Second Quarter: July 1–15 (includes a Midyear Narrative Report due July 30)
- Third Quarter: October 1–15
- Fourth Quarter: January 1–30 (includes a Terminal/Progress Report due February 15)

The ESO monitors submission status closely. Project leaders who miss deadlines will receive an official Memorandum. Repeated failure to submit required documentation is formally categorized as non-compliance, which may impact the project's standing and the leader's future designations.

Once a project is completed, the ESO conducts a comprehensive evaluation to measure success and community impact. This phase utilizes a toolkit which includes a CHED-approved instrument and, including:

- Client Satisfaction Surveys to gauge beneficiary feedback.
- Focus Group Discussions (FGD) and Key Informant Interviews (KII) for qualitative depth. The analyzed data is then shared with Project Leaders, College Coordinators, and the University Quality Assurance Office (UQAO) for institutional accreditation purposes.

The monitoring and evaluation instruments are shown in the succeeding pages.

# **MONITORING AND EVALUATION TOOLKIT**

**Extension Services Office  
University of Southern Mindanao  
Kabacan, Cotabato**

## Monitoring and Evaluation (M&E) Procedure for Extension Projects

The primary goal of this instrument is to systematically assess the progress, effectiveness, and impact of extension projects using both quantitative and qualitative data.

### 1. M&E Team and Frequency

Component	Detail	Rationale
Personnel	The <b>Monitoring and Evaluation (M&amp;E) Team</b> of the Extension Services Office.	Ensures objectivity, technical expertise, and consistency across all evaluated projects.
Frequency	<b>Twice Annually:</b> Midyear and Yearend Evaluation	Provides periodic checks for course correction (midyear) and a comprehensive assessment of the project outcome and any immediate impact the project may have (yearend).

### 2. Mandatory Instruments and Data Gathering

The evaluation is anchored on a mixed-methods approach to ensure reliability and depth of findings.

Instrument Type	Mandatory Requirement	Purpose
Quantitative	<b>Mandatory.</b> Must be administered during both Midyear and Yearend.	Measures tangible outputs (e.g., number of participants, adoption rates) and measurable outcomes (e.g., change in income, increase in knowledge scores).
Qualitative	<b>Mandatory to use ONE of the following:</b> Focus Group Discussion (FGD), Key Informant Interview (KII), or Observation Checklist.	Gathers in-depth feedback, captures beneficiaries' lived experiences, and explains the 'why' behind the quantitative data.

### 3. Detailed Step-by-Step M&E Procedure

#### *Phase 1: Preparation and Planning*

Step	Action by M&E Team	Description
<b>1. Review Project Plan</b>	Analyze the approved project proposal.	Revisit the project's <b>Objectives, Target Outputs, Expected Outcomes</b> , and initial M&E plan to ensure the instruments align with the project's goals.
<b>2. Sample Selection</b>	Identify project sites and participants.	Determine the sample size and sampling method for beneficiaries (for quantitative) and specific key stakeholders/groups (for qualitative).
<b>3. Instrument Finalization</b>	Prepare and reproduce all required tools.	Finalize the Quantitative Instrument and select the required <b>one qualitative instrument</b> (FGD, KII, or Observation Checklist) based on data needs. Secure translations if local language is required.
<b>4. Logistics</b>	Schedule M&E dates and inform project implementers and partners.	Coordinate travel, securing necessary permissions from project sites and participants for interviews/surveys.

#### *Phase 2: Data Collection (Midyear and Yearend)*

Step	Action by M&E Team	Frequency & Instruments
5. Quantitative Data Collection	Administer the standardized Quantitative Instrument.	<b>Midyear &amp; Yearend.</b> Surveys should target a representative sample of beneficiaries to measure interim progress (Midyear) or final outcome or any immediate impact (Yearend).
6. Qualitative Data Collection	Conduct the chosen qualitative activity.	<b>Midyear OR Yearend.</b> If FGD is chosen, conduct group sessions. If KII, interview project leaders or community officials. If Observation Checklist, visit the project site to document conditions and implementation firsthand.
7. Cross-Reference/Verification	Gather project reports and financial data.	Collect and compare data on project expenditure, attendance sheets, and project implementers' self-assessment reports against the M&E findings.

### *Phase 3: Data Analysis and Reporting*

Step	Action by M&E Team	Outcome
8. Data Analysis	Process and interpret all collected data.	<b>Quantitative:</b> Compute means, frequencies, percentages, and relevant statistical tests to determine if targets were met. <b>Qualitative:</b> Transcribe and code data to identify emerging themes and reasons for success or failure.
9. Report Generation	Consolidate findings into a formal M&E Report.	Report must clearly state the level of attainment of objectives, identify best practices, document challenges encountered and formulate recommendations for future actions.
10. Dissemination & Action Planning	Present findings and recommendations.	<b>Midyear:</b> The report should lead to an action plan for course correction and resource reallocation in the second half of the year. <b>Yearend:</b> The report should determine overall project success, inform future funding decisions, and guide the design of new extension programs.



Project Title: \_\_\_\_\_

Project Leader: \_\_\_\_\_

SO Number/Date Issued: \_\_\_\_\_

Fund Source: \_\_\_\_\_

Reporting Period: \_\_\_\_\_

**I. Project Information**

1. **Project Goal:** \_\_\_\_\_

2. **Project Objectives:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. **Key Stakeholders (include beneficiaries and partners):**

\_\_\_\_\_

4. **Project Location:** \_\_\_\_\_

5. **Project Deliverables:** (capacity building, production of IEC Materials, Product Demonstration, etc.)

\_\_\_\_\_  
\_\_\_\_\_

6. **Project Start Date:** \_\_\_\_\_

7. **Project End Date:** \_\_\_\_\_

## II. Monitoring Activities

This section focuses on tracking the progress of project activities and outputs.

Activity	Target	Actual Achievement	Data Source	Person / Team Responsible	Evaluator's Remarks
Number of trainings conducted			Training Design Training Completion Report Attendance Sheet	Project Leader/PMT	
Number of beneficiaries trained			Attendance Sheet	Project Leader/PMT	
Number of beneficiaries who rated the trainings as Satisfactory or Higher			Overall Training Evaluation Form Training Completion Report	Project Leader/PMT	
Number of partnership/s established			MOU/MOA Board Resolution clearly stating the roles of the parties	Project Leader/PMT	
Needs analysis conducted			Detailed Proposal clearly stating the process and result of the conduct of the Needs Assessment	Project Leader/PMT	
Profile of the project respondents			Detailed Proposal indicating the diversity of the project respondents	Project Leader/PMT	
Project Sustainability Plan			Detailed Proposal indicating a 3-year sustainability plan (Planning and Implementation to Impact Assessment)	Project Leader/PMT	
Number of articles submitted and/or published			News reports submitted to the ESO (Needs Assessment, Planning and Implementation, Re-planning and Catch-Up Plans, Monitoring and Evaluation)	Project Leader/PMT	
Project Documentation			IECs News Article Published	Project Leader/PMT	
Reports submitted			Training Design Training Completion Report Attendance Sheets Quarterly Monitoring and Evaluation Report (QMER) Midyear Narrative Report Yearend Narrative Report Terminal Report	Project Leader/PMT	
Budget Utilization			QMER	Project	

				Leader/PMT	
Number of faculty involved in Extension-related activities			CEC's IPCR	CEC	
Number of students involved in Extension-related activities			Training Design/Report Attendance Sheet Outreach Proposal		
Technology/output generated			CEC's IPCR	CEC	

### III. Evaluation Activities

This section focuses on assessing the outcomes and immediate impact of the project.

#### A. Quantitative Data: Community Survey (see Appendix A)

This section measures aspects of the project that can be numerically counted and analyzed. It intends to provide objective, measurable data related to the extent of community involvement.

#### B. Qualitative Data (See Appendix B and Appendix C)

This section focuses on gathering in-depth information about the project's impact, experiences and lessons learned. Data generated from this section may inform decisions on the continuity of the existing project, serve as initial needs assessment report, or may be a basis for future project proposals.

#### C. Observation Checklist (See Appendix D)

This section documents other observable aspects of the project and its implementation and intends to triangulate and enrich the data gathered from the first two sections of the evaluation instrument.

### IV. Evaluation Report

#### A. List of Faculty Members Involved in the Project (source of info: Training Completion Report)

Name of Faculty	Title of Activity	Role (Resource Person/Facilitator)	Activity Date
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**B. Client Satisfaction Rating**

Overall Average Rating	:	
Final Score (Overall Average Rating x 2)	:	

**C. Qualitative Comments and Suggestions**

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**IV. Impact Assessment (To be conducted at appropriate intervals)**

1. **Long-term Outcomes:** (How has the project contributed to the broader long-term goals?)
2. **Sustainability:** (Are the changes brought about by the project likely to last?)
3. **Unintended Consequences:** (Have there been any unexpected positive or negative impacts?)
4. **Overall Impact Narrative:** (A brief summary of the project's overall impact on the community)

## APPENDIX A

### CLIENT SATISFACTION SURVEY

(CHED-Endorsed Instrument)

**Panuto/Instructions:** Tukuyin kung gaano kayo sumasang-ayon o hindi sumasang-ayon sa sumusunod na mga pahayag batay sa mga isinagawang aktibidad sa proyektong nabanggit sa itaas. Lagyan ng tsek ang numerong tumutugma sa inyong sagot. *(Please indicate how much you agree or disagree with the following statements based on the conducted activities in the abovementioned project. Check the number that corresponds to your answer).*

A.1. Ang extension project na isinagawa ng kolehiyo/unibersidad ay tumugon sa mga sumusunod na natukoy na pangangailangan ng aming komunidad. *(The extension project conducted by the college/university addressed the following identified needs of our community).*

Ang mga natukoy na pangangailangan ay ang mga sumusunod (List the identified needs here):

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- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.2. Ang extension project ng USM ay nakapagbigay ng kaalaman at kakayahan na nagagamit sa aming mga pang-araw araw na gawain/pamumuhay. *(The extension project of the college/university provided knowledge and skills that are useful in our daily activities).*

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.3. Ang extension project ng kolehiyo/unibersidad ay matagumpay na ipinatupad/ipinapatupad batay sa napagkasunduang mga layunin. *(The extension project of the college/university was successfully implemented/ is being implemented according to its agreed objectives).*

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.4. Ang mga aktibidad ng extension project ng USM ay naisagawa/isinasagawa ayon sa napagkasunduang iskedyul. (*The activities of USM were carried out/ are being carried out according to the agreed schedule*).

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.5. Ang mga aktibidad ng extension project ng USM ay malinaw at madaling maunawaan. (*The activities of USM are clear and easy to understand*).

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.6. Ang mga tagapagpatupad ng extension project ng USM ay nakikinig at tumutugon sa aming mga mungkahi. (*The implementers of the USM extension project listed to and respond to our suggestions*).

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.7. Ang extension project ng USM ay nakatulong sa pagpapaunlad ng aming buhay. (*The extension project of USM has contributed to the improvement of our lives*).

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.8. Ang extension project ng USM ay walang naidulot na anumang negatibong epekto sa amin. (*The extension project of USM has not caused any negative effects on us*).

- Lubos na sumasang-ayon (Strongly Agree)
- Sumasang-ayon (Agree)
- Bahagyang sumasang-ayon (Slightly Agree)
- Hindi sumasang-ayon (Disagree)
- Lubos na hindi sumasang-ayon (Strongly Disagree)

A.9. Gaano ka nasisiyahan sa isinagawa/isinasagawang extension project ng kolehiyo/unibersidad? (*How satisfied are you with the extension project implemented/being implemented by the college/university?*)

- Lubos na nasisiyahan (Very Satisfied)
- Nasisiyahan (Agree)
- Bahagyang nasisiyahan (Slightly Satisfied)
- Hindi nasisiyahan (Dissatisfied)
- Lubos na hindi nasisiyahan (Very Dissatisfied)

A.10. Base sa iyong karanasan, irerekomenda mo ba sa iba na sumali sa extension project na ito kung may pagkakataon? (*Based on your experience, would you recommend others to join the extension project, if given the opportunity?*)



**APPENDIX B**  
**Focus Group Discussion (FGD) Guide**

1. What are your overall impressions of the project?  
*(Sa pangkalahatan, ano ang masasabi ninyo sa project na ito?)*

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2. What aspects of the project have you found most beneficial? Why?  
*(Anong mga bahagi ng project ang sa tingin ninyo ay pinaka-nakatulong sa inyo? Bakit?)*

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3. Have you faced any challenges in participating in the project? If so, what were they?  
*(May mga nagging problema ba o hamon sa pagsali ninyo sa project na ito? Kung meron, ano-ano ang mga ito?)*

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4. How has the project influenced [*Specific area related to the project objectives e.g. knowledge/perception level, income level, etc.* ] in your community?  
*(Paano nakatulong o nakabago ang project na ito sa inyong komunidad, lalong-lalo na sa inyong kaalaman, kita, etc).*

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5. What suggestions do you have for improving the project in the future?  
*(Ano ang inyong mga mungkahi o 'suggestions' para mas mapaganda pa ang project sa mga susunod pang mga taon?)*

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**APPENDIX C**  
**Key Informant Interview (KII) Guide:**

1. What is your role in relation to this project?  
(Ano ang inyong papel o obligasyon sa project na ito?)

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2. From your perspective, how well has the project been implemented?  
(Sa inyong pananaw, kumusta ang naging pagpapatakbo o pag-implemanta ng project?)

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3. What are the key successes and challenges you have observed?  
(Ano ang mga nakita ninyong naging tagumpay at mga naging problema sa project?)

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4. How has the project impacted the community from your viewpoint?  
(Sa inyong palagay, ano ang naging epekto ng project na ito sa inyong komunidad?)

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5. What are the long-term sustainability prospects for the initiatives introduced by the project?  
(Sa inyong palagay, kaya bang panindigan o ituloy-tuloy ng komunidad and mga nasimulang programa kahit tapos na ang project?)

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#### APPENDIX D Observation Checklist

1. Level of community participation in activities  
(Antas ng paglahok ng komunidad sa mga aktibidad)

- High (Mataas)
- Medium (Katamtaman)
- Low (Mababa)

2. Availability and accessibility of project resources  
(Pagkakaroon o kadalian ng pagkuha ng mga kagamitan para sa project)

- Readily available/accessible (Madaling makakuha/madaling gamitin)
- Relatively available/accessible (Medyo madaling makuha/medyo madaling gamitin)
- Hardly available/accessible (Mahirap makuha/mahirap gamitin)

3. Evidence of collaboration among stakeholders  
(Patunay ng pagtutulungan ng mga stakeholders)

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4. General enthusiasm and engagement of participants

*(Sigla at pakikilahok ng mga kalahok sa project)*

Very enthusiastic

Enthusiastic

Passive

5. Other relevant observable aspects of the project

*(Iba pang mga obserbasyon sa project)*

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# QUARTERLY MONITORING AND EVALUATION REPORT

<b>Project Title:</b>		Period Covered:
<b>Proponent(s):</b>		Fund Source:

<b>Activities</b> <i>Based on the Work Plan Schedule</i>	<b>Outputs</b>	<b>Accomplishments</b>		<b>(%) Completion (Cumulative)</b>	<b>Problems Encountered (if any)</b>	<b>Action</b>
		<b>Target (%)</b> <i>Based on the Milestone in the Workplan</i>	<b>Actual (%)</b>			
% Completion (Cumulative) from the previous quarter: _____ %						

Prepared by:

Noted by:

Evaluated by:

\_\_\_\_\_

Project Leader

\_\_\_\_\_

College Extension Coordinator

\_\_\_\_\_

Director, Extension Services Office

