



# MONITORING AND EVALUATION (M&E) POLICY

# **Balkans Forward Foundation**

## **MONITORING AND EVALUATION (M&E) POLICY**

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# 1. Purpose

The purpose of this Monitoring and Evaluation (M&E) Policy is to ensure that Balkans Forward Foundation (“the Foundation”) systematically tracks, reviews, and learns from its work in order to improve quality, strengthen accountability, support decision-making, and better understand results and impact.

The Foundation is committed to using monitoring and evaluation as a practical tool for learning, effectiveness, transparency, and responsible use of resources.

# 2. Scope

This policy applies to all programmes, projects, grants, events, structured activities, and organisational initiatives implemented by or on behalf of the Foundation.

It applies to all persons involved in planning, implementation, oversight, reporting, learning, or review, including the Board, Executive Director, staff, consultants, volunteers, and relevant partners.

# 3. General Principles

Monitoring and evaluation must be proportionate, useful, realistic, and aligned with the scale, purpose, and nature of the work.

The Foundation shall seek to monitor not only what was done, but also what changed, what worked, what did not, and what can be improved.

Data and evidence should be used responsibly, ethically, and in a way that supports learning rather than creating unnecessary administrative burden.

## 4. Monitoring

Monitoring refers to the ongoing collection and review of information during implementation.

The Foundation shall monitor activities, outputs, timelines, participation, spending, risks, and other relevant aspects of implementation as appropriate.

Monitoring should support timely decision-making, accountability, and early identification of problems or necessary adjustments.

## 5. Evaluation

Evaluation refers to a more structured review of the relevance, quality, effectiveness, outcomes, or broader significance of a project, programme, or activity.

Evaluations may be internal or external and may take place during implementation or after completion.

Not every activity requires a formal evaluation, but the Foundation should periodically assess whether its work is achieving meaningful results.

## 6. Indicators, Evidence, and Learning

Where appropriate, the Foundation should define realistic indicators or reference points to help assess progress and results.

Evidence may include quantitative data, qualitative feedback, participant reflections, case examples, outputs, reports, observations, or other relevant sources.

The Foundation recognises that not all meaningful change can be measured in simple numbers and that context matters.

## 7. Use of Findings

Monitoring and evaluation findings should be used to improve programme design, implementation, communication, decision-making, and future planning.

Where relevant, lessons learned should be documented and shared internally.

The Foundation should also use findings, where appropriate, for accountability to donors, partners, participants, and other stakeholders.

## 8. Roles and Responsibilities

Project leads and relevant staff are responsible for ensuring that monitoring and reporting are built into implementation.

The Executive Director is responsible for overall oversight of organisational learning, quality, and accountability.

The Board has oversight responsibility in relation to strategic learning, accountability, and institutional effectiveness.

## 9. Ethics, Data Protection, and Sensitivity

Monitoring and evaluation activities must be conducted ethically and with appropriate respect for privacy, dignity, safety, and informed participation.

Special care must be taken where work involves vulnerable individuals, human rights defenders, LGBT+ persons, minority communities, or sensitive political or social contexts.

Any personal data collected through monitoring or evaluation must be handled in accordance with the Foundation's Data Protection Policy.

## 10. Documentation and Record-Keeping

Monitoring and evaluation materials, findings, and supporting documentation should be retained in an organised and accessible manner.

This includes, where relevant, attendance records, participant feedback, indicators, reports, evaluation summaries, and lessons learned.

Documentation should be sufficient to support accountability and future reference without creating unnecessary data collection or storage.

## 11. Breach of Policy

Failure to comply with this policy may result in corrective or disciplinary action where appropriate.

Deliberate misreporting, manipulation of data, concealment of relevant findings, or misuse of participant information may be treated as a serious violation.

## 12. Related Policies

This policy should be read together with the Project Management Policy, Data Protection Policy, Document Retention and Archiving Policy, Code of Conduct, and any relevant donor requirements.

## 13. Review of the Policy

This policy shall be reviewed periodically and updated as necessary to reflect organisational learning, operational needs, and good practice.