

## **Quarterly Monitoring Chart (QMC)**

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The format

Questions to ask yourself

Example: Vegetable trainings

**QMC**

Partner name:

Year:

Quarter (Jan, April, July, or Oct):

Immediate objective	Activities & short-term objectives	Activities implemented		Short-term objectives achieved		Comments
		Planned	Actual	Planned	Actual	
As stated in the partnership agreement	Activities as stated in your budget sheet  Short-term objective: what is the purpose of the activity?	Activities expected – detailed description.  Provide numbers, and total budget.	Activities that took place.  Provide numbers, and amount spent.	Effects and changes expected to happen.  State the deadline: How much do you expect to achieve by which <u>year/ quarter</u> ?  For ex. 2007-1 (2007 – end of first quarter).	Effects and changes that took place.  Was your short-term objective achieved? Indicate results with:  ☺ Fully achieved ☹ Partly achieved ☹ Little achieved	a. Was this quarter the deadline?  b. What went well and not so well, and what is the next step?
	Activity:        Short-term objective:	Budget, total:	Spent, until now:			Balance:

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## How to Make a QMC

The Quarterly Monitoring Chart (QMC) is a tool that helps you plan and report on:

- Activities – what you plan to do and what you have done, and
- Achievements – what you plan to achieve from activities and what you did achieve.

The QMC is designed for group discussion. Use it when you plan and monitor your work.

Doing the QMC alone at your desk, you might fill in the blanks, but as a rule it is a bad idea.

You can see a print of the QMC above. The format has seven columns – 1 to 7.

In the following pages, we will explain how each of the seven columns is filled in.

### 1) Immediate objective

Each activity must link to an immediate objective in your partnership agreement.

Like in the budget (see “Budget and Expenditures”, you must show this link.

Therefore, enter the relevant immediate objective for the activity in column 1.

### 2) Activities & Short-term objectives

In column 2, you enter the activities to be implemented – but only for the next quarter.

Do NOT enter all the activities for the year immediately (see the section “QMC cycle”).

Below the activity, state the purpose. The purpose is called the ‘short-term objective’.

**QMC**

Partner name:

Year:

Quarter (Jan, April, July, or Oct):

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As stated in the partnership agreement	Activities as stated in your budget sheet  Short-term objective: what is the purpose of the activity?	Activities expected – detailed description.  Provide numbers, and total budget.	Activities that took place.  Provide numbers, and amount spent.	Effects and changes expected to happen.  State the deadline: How much do you expect to achieve by which <u>year/ quarter</u> ?  For ex. 2007-1 (2007 – end of first quarter).	Effects and changes that took place.  Was your short-term objective achieved? Indicate results with:  ☺ Fully achieved ☺ Partly achieved ☺ Little achieved	a. Was this quarter the deadline?  b. What went well and not so well, and what is the next step?
Which of our immediate objectives does the activity relate to?  When the activity is done, which immediate objective has it helped to achieve?	Activity: What is the activity about in brief?  Short-term objective: What do we want to achieve in brief?	Who will do it? Where will we do it? How many will participate? Which materials are used? How much will we do?  Budget, total: What is the amount in our budget?	What did we actually do, who did it, and where? How many participated – and who (women, ethnic groups)?  Spent, until now: How much did we spend (so far)?	What improvements do we expect to achieve? How much will improve and for which people (women, ethnic groups etc.?)  When do we expect the effect / changes to have happened? In the second quarters, third quarter, or next year?	What did actually improve? How much did things improve and for whom? Did we achieve the planned effects / changes? Did unexpected changes occur? Is the deadline for the activity up yet? Or will we only evaluate it in a later quarter or next year?	Why did things work well or not so well? Do we need to follow up on the activity? Should we spend some of the money differently?  What is the next step?  Balance: Do we have money left? Or did we over-spend?

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Example: the purpose of vegetable trainings could be to “enhance income in the groups”.

When you fill in the QMC, ask your self questions like those shown in the QMC above.

Example: why do we carry out the activity? How? What do we want to achieve?

### **3) Planned activities**

In column 3, describe the activity in detail. Who is going to do what, how, and when?

Give quantities, such as: number of events, participants, and days, and materials used.

Then enter the budget amount. Find it in the budget sheet (see “Budget and expenditures”).

### **4) Actual activities**

When the activity is done, go to column 4. Describe here what you actually did.

Ask yourself: Did the activity take place as planned, who participated, and so on.

Below this detailed account of the activity implemented, state the amount spent.

### **5) Planned achievements**

In column 5, write what you plan to achieve. What effects or changes do you expect?

Look at the short-term objective in column 2 and elaborate: what will you achieve in detail?

Example: you may plan to enhance income through vegetable trainings. This is all good.

**QMC**

Partner name:

Social Development Center

Year:

2007

Quarter (Jan, April, July, or Oct):

Jan

Immediate objective	Activities & short-term objectives	Activities implemented		Short-term objectives achieved		Comments
		Planned	Actual	Planned	Actual	
As stated in the partnership agreement	Activities as stated in your budget sheet  Short-term objective: what is the purpose of the activity?	Activities expected – detailed description.  Provide numbers, and total budget.	Activities that took place.  Provide numbers, and amount spent.	Effects and changes expected to happen.  State the deadline: How much do you expect to achieve by which <u>year/ quarter</u> ?  For ex. 2007-1 (2007 – end of first quarter).	Effects and changes that took place.  Was your short-term objective achieved? Indicate results with:  ☺ Fully achieved ☺ Partly achieved ☹ Little achieved	a. Was this quarter the deadline?  b. What went well and not so well, and what is the next step?
Economic livelihoods among the group members are increased	Activity:  Vegetable growing training  Short-term objective:  Groups earn income from growing vegetables	Five trainings, 3 days each, 200 participants in 4 VDCs, on how to grow tomatoes, carrots, and beans  Budget, total: 12,800	Spent, until now:	150 participants start to grow vegetables this season. 100 get a good harvest. They sell vegetables and earn an income by <u>2007-4</u> (end of forth quarter).		Balance:

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However, how much should income increase and for how many people? Ask yourself:

- Who is going to benefit
- How many is going to benefit
- What is to change or improve
- How much is to change and improve
- How soon do we expect results

Once you have answered these questions, you know exactly what you want to achieve.

Knowing what to aim at, you can also better evaluate whether you achieved something!

The QMC above shows how you could plan achievements from vegetable trainings.

### The deadline

In column 5, a very important task remains. Always remember to do the following:

Inform in which year and quarter you expect the achievements to have happened!

Many activities are done in one quarter while achievements can only be seen much later.

Example: While vegetable trainings are done in spring, income only increases after the harvest!

Therefore: always assess carefully when you expect the results to happen. Write that here.

If you expect results in the third quarter of 2007, enter “2007-3”; if in the second quarter of 2008, enter “2008-2”, and so on.

Once you have described your planned achievements in detail, ask in your group:

- OK, are these the end-results?
- Or will something happen even after that?

**QMC**

Partner name:

Social Development Center

Year:

2007

Quarter (Jan, April, July, or Oct):

April

Immediate objective	Activities & short-term objectives	Activities implemented		Short-term objectives achieved		Comments
		Planned	Actual	Planned	Actual	
As stated in the partnership agreement	Activities as stated in your budget sheet  Short-term objective: what is the purpose of the activity?	Activities expected – detailed description.  Provide numbers, and total budget.	Activities that took place.  Provide numbers, and amount spent.	Effects and changes expected to happen.  State the deadline: How much do you expect to achieve by which <u>year/ quarter</u> ?  For ex. 2007-1 (2007 – end of first quarter).	Effects and changes that took place.  Was your short-term objective achieved? Indicate results with:  ☺ Fully achieved ☺ Partly achieved ☹ Little achieved	a. Was this quarter the deadline?  b. What went well and not so well, and what is the next step?
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## 6) Actual achievements

In column 6 the planned achievement is evaluated. Here questions to ask include:

What did we actually achieve from the activity? What effects or changes took place?

But also ask: what unexpected effects and changes took place? What happened?

You must update this column every quarter until the deadline for the achievement.

Although your deadline is only two or three quarters ahead, describe your progress!

Above we show the example of vegetable trainings. The status so far is the following:

“Some members have bought seeds and are preparing to sow”.

Use the ‘smileys’ to indicate how happy you were with the results compared to the plan.

The principle is the following:

- Happy smile: we achieved the planned effects or changes to a high degree.
- Flat mouth: the achievement was lower than planned – medium but still an OK result.
- Sad face: much less was achieved than planned. We hope for better result next time.

The smiley gives a quick indication but more importantly than the smiley is what you write.

The next two pages follow the example of vegetable trainings through two more quarters.

Observe how the status is updated quarterly:

**QMC**

Partner name:

Social Development Center

Year:

2007

Quarter (Jan, April, July, or Oct):

July

Immediate objective	Activities & short-term objectives	Activities implemented		Short-term objectives achieved		Comments
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## 7) Comments

The final column to the right is reserved comments. Write the following here:

- Is the deadline up? If no, remind yourself to follow up on the activity also next quarter.
- What went and not so well. Explain this in brief (example: why did few participate?)
- What is going to happen next (example: who is going to take action, where, and when?)

Below your comments, enter the balance amount for the activity (remaining amount).

You can calculate the amount or fetch it quickly from “Budget and Expenditures”.

It is always good to monitor closely whether money is remaining or has been overspent.

Perhaps you can use it for some other activity (see the section “Budget adjustments”).