

Assessment template Phase-in Plan for projects

**This assessment covers the following Phase-in plan**

|  |  |
| --- | --- |
| Name lead organization |  |
| Name other implementing organization(s) (if applicable) |  |
| Title of project |  |
| Year |  |
| Assessment by (names + roles) |  |
| Date |  |

# Introduction

***How to use this assessment form?***

* This assessment template is linked to the phase-in plan template for partners
* Each section in the phase- in plan template is assessed by the country office and the HAC NL experts.
* The assessors give scores for each key theme for assessment and explains the score in the column ‘Assessment’. Subsequently, the assessor gives an overall assessment per chapter, again using a score and an explanation; in this assessment the various elements of the chapters can be weighed and the elements that are deemed most important for the assessment mentioned
* Finally each assessor lists the 3 major points of improvement (from their own perspective) in the final assessment on the last page.
* Scores to be used for the assessment of the key themes and the overall assessment per chapter:

4 **Good** all relevant aspects of the key theme all well addressed – no major comments

3 **Sufficient** most relevant aspects of the key theme are well addressed, but some relevant aspects are missing or can be improved. The plan can be approved with specified conditions.

2 **Insufficient** only some aspects of the key theme are addressed with major relevant aspects missing or not treated adequately. The plan cannot be approved

1 **Poor** the key theme is hardly addressed. The plan cannot be approved

* Finally, in a subsequent group assessment a conclusion is reached about the quality of the phase-in plan as a whole. Only the three major points of improvement per field of expertise are discussed in the group. One person compiles the assessment form and sends it to the partner.

# Assessment

|  |  |  |
| --- | --- | --- |
| **Phase-in Plan template** | **Assessment** | **Score** **1-4** |
| **Programme description (max 3.5 pages)**1.1 | Context analysis/problem statement – children, youth, project location challenges etc.  |  |  |
| 1.2 | Selected communities where community challenge will take place, see for more information chapter 8.3 of the CCCD Manual.  |  |  |
| 1.3 | Target beneficiaries during phase IN (number communities & SHGs) |  |  |
| 1.4 | Narrative description of activities in line with excel sheet (both communities challenge activities, initial activities and CAM) |  |  |
| 1.5 | Describe if the area is feasible for CAM Plus (for criteria check the guidelines on Disability inclusion) |  |  |
| 1.6 l Expectations of external support from Help a Child besides funding |  |  |
| **Score for the quality of this section (1-4):****Explanation of the score:** |

|  |  |  |
| --- | --- | --- |
| **Phase-in Plan template** | **Assessment** | **Score** **1-4** |
| **2. Planning, Monitoring, Evaluations and Learning (max 1/2 page)** |  |  |
| 2.1 lDescribe what PMEL activities are planned and list the results including output and outcome indicators per pathway of change |  |  |
| **Score for the quality of this section (1-4):****Explanation of the score:** |

|  |  |  |
| --- | --- | --- |
| **Phase-in Plan template** | **Assessment** | **Score** **1-4** |
| **3 Sustainability and Complementarity (max 1 page)** |  |  |
| 3.1 lShortly describe what kind of activities you have planned for Phase IN year to ensure that sustainability of results can be achieved – focus on project  |  |  |
| 3.2 lExplain how you will link with, collaborate and learn from government authorities and other stakeholders during the phase IN phase. |  |  |
| **Score for the quality of this section (1-4):****Explanation of the score:** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Phase-in Plan template** | **Assessment** | **Score** **1-4** | **Requested in the template** |
| **4. Financial Budget and Work Plan** |  |  |  |
| 5.2 | Planned Budget | * Is the budget within the indicated financial framework?
* Is the budget realistic and attainable?
* Is the budget enabling good implementation of annual activities?
* What is (relative) own contribution of the organisation to the budget?
* What is the staff / activity budget ratio?
* What is the overhead / total budget ratio?
* What is the hardware / software ratio?
* Are the budget and narrative in line with each other?
* Is each budget line build up from unit costs \* number of units?
* Are the unit costs and numbers understandable?
* Is the budget in the format as explained in the plan template?
* PMEL max 3%?
* Management costs excluding direct staff and PMEL max 15%?
* Assets purchase is relevant and understandable?
 |  |  |
| **Score for the quality of this section (1-4):****Explanation of the score:** |

|  |
| --- |
| **OVERALL ASSESSMENT** |
| **To what extent is this Phase-in Plan acceptable?*** Fully acceptable, no changes needed
* Acceptable with some changes

 * Not acceptable in this form, major changes needed

**Three major changes needed to reach full acceptance are explained here:**1. …
2. …
3. …
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