## *Volunteers National Organization for Development and Humanitarian Service*

***Organizations Background:***

Volunteers National Organization for Development and Humanitarian Services is a Sudanese women lead NGO registered as a national voluntary charitable humanitarian non-governmental organization founded by group of women and youth volunteers, whom work in humanitarian and development domain. The creation of this organization is inspired by a feeling among this group that something must be done to mitigate the sufferings of women's, girls and youth in Darfur in particularly and in Sudan in general.

Volunteers National Organization for Development and Humanitarian Services was established in 2014, and was officially registered with the humanitarian aid commission (HAC) as a local, non-governmental organization to provide relief, and advocate for the promotion of human rights principles.

Volunteers National Organization for Development and Humanitarian Services is a non-religious non-political, non-profitable and non-commercial organization; it is basically a humanitarian organization whose vision is to promote "Peace, Unity Development, women rights and women Empowerment for All" among the different communities, ethnic groups and tribes in Darfur and Sudan in general. National Volunteers has been able to acquire sufficient community goodwill that will enable it to implement future activities smoothly

# PMERL HANDBOOK

**For the National Volunteers Organization for Development and Humanitarian Services (VOLUNTEERS)**

## 1. Introduction

This PMERL (Planning, Monitoring, Evaluation, Reporting, and Learning) Handbook is developed to serve as a comprehensive guide for managing the performance and impact of all development and humanitarian programs implemented by the National Volunteers Organization for Development and Humanitarian Services (VOLUNTEERS). As a commitment to effectiveness, accountability, and transparency, VOLUNTEERS will institutionalize the PMERL system across all levels of the organization. This handbook provides practical tools, standard procedures, and guiding principles to embed PMERL in the design, execution, and assessment of interventions. VOLUNTEERS will foster a culture of evidence-based decision-making and continuous learning to strengthen community impact, demonstrate results to donors, and improve service delivery.

## 2. Purpose of the Handbook

The purpose of this handbook is to establish a consistent, practical, and scalable PMERL system across the organization's projects. As a commitment to organizational excellence, VOLUNTEERS will:

- Provide clear guidelines for planning, monitoring, evaluation, reporting, and learning.
- Ensure that all projects are aligned with the organization's strategic goals and community needs.
- Promote accountability through the documentation and dissemination of project performance.
- Enable timely adjustments and strategic improvements based on real-time data.
- Build the capacity of volunteers and staff to engage with PMERL processes effectively.

This handbook will serve as both a training manual and a reference tool, enabling all project teams to standardize processes while allowing for flexibility and contextual relevance.

## 3. Organizational Overview

**VOLUNTEERS** is a non-profit, non-governmental organization committed to promoting sustainable development and providing humanitarian assistance through volunteerism. Operating at both national and local levels, the organization supports vulnerable communities in areas such as health, education, environment, livelihoods, and disaster response.

**Mission:** To empower communities through volunteerism for sustainable development and humanitarian support.
**Vision:** A resilient and empowered society driven by service and solidarity.
**Core Values:**

- **Volunteerism:** Service above self.

- **Accountability:** To communities, donors, and partners.
- **Inclusivity:** Reaching the most marginalized.
- **Transparency:** Open and honest communication.
- **Equity:** Fairness in service delivery and internal governance.

As a commitment to its core values, VOLUNTEERS will integrate PMERL principles into all organizational operations to ensure transparency, participation, and measurable results.

**4. PMERL Framework**

The PMERL framework provides a comprehensive system for performance management. It links program design to implementation, tracks progress, assesses results, ensures learning, and informs stakeholders. As a commitment to continuous improvement and organizational accountability, VOLUNTEERS will fully adopt and implement this PMERL framework in every project lifecycle.

The five components are interconnected:

1. **Planning** involves setting priorities, defining objectives, establishing indicators, and preparing implementation roadmaps.
2. **Monitoring** ensures timely and systematic data collection to track inputs, outputs, and outcomes.
3. **Evaluation** examines project results to understand their relevance, effectiveness, efficiency, impact, and sustainability.
4. **Reporting** communicates project progress, challenges, and successes to stakeholders in a structured format.
5. **Learning** ensures the use of findings and feedback to inform future programming and policy-making.

VOLUNTEERS will adopt this cycle to support data-driven decision-making and strengthen program accountability.

**5. Planning**

Planning is the foundation of effective project implementation. It ensures that activities are aligned with strategic goals and community needs. As a commitment to strategic and participatory programming, VOLUNTEERS will ensure all planning processes are inclusive, data-informed, and goal-oriented.

Key planning elements include:

- **Situational Analysis:** Identifies needs, risks, and opportunities using tools like SWOT, PESTLE, and stakeholder mapping.
- **Theory of Change (ToC):** Outlines the logical sequence of interventions leading to desired impacts.

- **Logical Framework Matrix (Logframe):** Translates ToC into specific, measurable, achievable, relevant, and time-bound (SMART) objectives, indicators, and assumptions.
- **Work Plan and Budgeting:** Defines timelines, roles, resources, and costs for activities.
- **Risk and Mitigation Plan:** Identifies potential obstacles and proposes countermeasures.

VOLUNTEERS will commit to developing context-responsive, participatory, and flexible plans that remain aligned with community aspirations and organizational goals.

**6. Monitoring**

Monitoring tracks project progress against plans. It enables timely decision-making and course correction. Effective monitoring answers the question: "Are we doing what we said we would do?" As a commitment to adaptive management and accountability, VOLUNTEERS will institutionalize regular and structured monitoring practices.

Core Monitoring Activities:

- Routine data collection using agreed indicators.
- Use of Monitoring and Evaluation (M&E) calendars.
- Spot checks and field monitoring visits.
- Monthly or quarterly review meetings.

Monitoring Tools:

- Monitoring Framework
- Activity Implementation Tracker
- Beneficiary Feedback Logs
- Dashboard Reports

VOLUNTEERS will ensure monitoring data is reliable, timely, and used effectively for decision-making and stakeholder engagement.

**7. Evaluation**

Evaluation assesses the value and impact of programs. It goes beyond monitoring by examining whether desired changes occurred and why. Evaluations may be internal or external, and they can be formative (early-stage), summative (end-stage), or impact-focused.

As a commitment to learning and improvement, VOLUNTEERS will integrate robust evaluation mechanisms in all major interventions.

Evaluation Criteria (OECD-DAC):

- **Relevance:** Is the project aligned with community priorities?
- **Effectiveness:** Are objectives being achieved?
- **Efficiency:** Are resources used wisely?

- **Impact:** What are the broader effects?
- **Sustainability:** Will results continue post-intervention?

Steps in Evaluation:

- Develop Evaluation Terms of Reference (ToR)
- Hire evaluators or establish internal teams
- Conduct data collection and analysis
- Prepare evaluation report
- Disseminate findings and recommendations

VOLUNTEERS will ensure evaluations are participatory, independent, and geared toward actionable learning.

**8. Reporting**

Reporting is a critical communication function that shares information with internal and external stakeholders. Reports provide transparency, facilitate decision-making, and build trust. As a commitment to transparent governance, VOLUNTEERS will ensure timely and consistent reporting across all programs and projects.

Types of Reports:

- **Activity Reports:** Monthly updates from field teams.
- **Progress Reports:** Quarterly summaries aligned to project logframe.
- **Annual Reports:** Summative performance at organizational level.
- **Donor Reports:** Customized formats based on funding agreements.
- **Incident Reports:** Documentation of critical issues or deviations.

Quality Reporting Practices:

- Use of standard templates.
- Clear data visualization (charts, graphs).
- Timely submission and review.
- Integration of beneficiary voices.

VOLUNTEERS will commit to ensuring that reports not only meet compliance requirements but also reflect community impact and accountability.

**9. Learning**

Learning turns information into knowledge and action. It ensures that the organization evolves by analyzing successes and failures. As a commitment to continuous improvement, VOLUNTEERS will actively promote a learning culture that encourages feedback, innovation, and adaptation.

Learning Activities:

- **After Action Reviews (AARs):** Structured reflection sessions after key events.
- **Lessons Learned Workshops:** Periodic meetings to gather team insights.
- **Peer Learning Sessions:** Cross-project sharing of practices.
- **Case Studies and Success Stories:** Document and publish experiences.

Institutional Learning:

- Maintain a knowledge repository.
- Update policies and training based on findings.
- Reward innovation and adaptation.

VOLUNTEERS will embed learning into every stage of the program cycle to inform decision-making and future strategy.

**10. Roles and Responsibilities**

A successful PMERL system relies on clear roles and responsibilities. As a commitment to collaborative governance, VOLUNTEERS will define and uphold PMERL-related responsibilities for each organizational role.

| Role | Responsibilities |
|---|---|
| **PMERL Officer** | Lead PMERL processes; develop tools; provide training. |
| **Project Managers** | Implement PMERL at project level; oversee data collection and reporting. |
| **Volunteers** | Collect community data; provide local feedback. |
| **M&E Committee** | Ensure quality and accountability; advise leadership. |
| **Partners** | Collaborate in joint monitoring and learning efforts. |

VOLUNTEERS will ensure that all staff and volunteers are capacitated and supported to fulfill these roles effectively.



**11. Data Management and Quality Assurance**

Data is the foundation for evidence-based decision-making. Ensuring data integrity, security, and accessibility is vital to the credibility of VOLUNTEERS' PMERL system. As a commitment to transparency and evidence-driven programming, VOLUNTEERS will institutionalize high standards of data quality and management.

Key Principles:

- **Accuracy:** Data reflects true project conditions.
- **Timeliness:** Data is collected and reported within appropriate intervals.
- **Reliability:** Methods and tools produce consistent results.
- **Confidentiality:** Sensitive data is securely stored and accessed responsibly.

VOLUNTEERS will establish standardized tools, train staff and volunteers in data collection protocols, and implement regular data quality audits. Volunteers will commit to collecting, managing, and using data responsibly and ethically to ensure project accountability and community trust.

**12. Tools and Templates**

Standardized tools and templates enhance consistency and comparability across projects. As a commitment to operational efficiency and quality assurance, VOLUNTEERS will develop and disseminate core PMERL templates for planning, monitoring, evaluation, reporting, and learning.

Key Tools:

- Project Logframe Template
- Activity Monitoring Form
- Evaluation ToR Template
- Progress Report Template
- Learning Documentation Template

VOLUNTEERS will maintain a central repository of tools and ensure all teams are oriented in their use. Volunteers will commit to using these tools accurately and consistently to ensure the integrity and comparability of PMERL information across projects and locations.

**13. Capacity Building**

The effectiveness of a PMERL system depends on the skills and knowledge of those implementing it. As a commitment to organizational growth and sustainability, VOLUNTEERS will prioritize capacity development for all staff and volunteers engaged in PMERL processes.

Capacity Development Approaches:

- Induction and refresher training on PMERL concepts.
- On-the-job coaching and mentorship.
- Peer-to-peer learning platforms.
- External training and certification opportunities.

VOLUNTEERS will regularly assess capacity gaps and design training programs accordingly. Volunteers will commit to actively engaging in learning opportunities and applying new skills to enhance data use, accountability, and impact.

**14. Accountability and Feedback Mechanisms**

Accountability ensures responsiveness to communities and stakeholders. As a commitment to inclusive and rights-based development, VOLUNTEERS will integrate community feedback systems and accountability mechanisms into all interventions.

Mechanisms:

- Feedback and complaint boxes
- Toll-free hotlines and SMS platforms
- Community dialogue forums
- Stakeholder review sessions

VOLUNTEERS will ensure that feedback is documented, analyzed, and responded to in a timely and respectful manner. Volunteers will commit to promoting feedback channels, safeguarding respondents' rights, and ensuring community concerns shape project design and implementation.

**15. Risk Management and Adaptive Programming**

Risks are inherent in humanitarian and development work. As a commitment to proactive and flexible programming, VOLUNTEERS will embed risk identification, monitoring, and mitigation strategies into the PMERL cycle.

Key Elements:

- Risk Register in project planning.
- Early Warning Indicators in monitoring.
- Scenario Planning during evaluations.
- Real-time adaptation protocols.

VOLUNTEERS will create enabling conditions for rapid feedback loops and agile programming. Volunteers will commit to reporting risks as they emerge and participating in adaptive measures to maintain program relevance and safety.

**16. Knowledge Management**

Knowledge management supports institutional memory, learning, and innovation. As a commitment to organizational intelligence and effectiveness, VOLUNTEERS will establish systems to capture, store, and share knowledge across teams and stakeholders.

Knowledge Practices:

- Documenting case studies, lessons learned, and innovations.
- Maintaining a centralized digital repository.
- Promoting internal knowledge-sharing events.
- Engaging external platforms for visibility.

VOLUNTEERS will encourage a culture of openness, reflection, and learning. Volunteers will commit to contributing insights, documenting experiences, and participating in knowledge exchange to strengthen program design and delivery.

**17. Use of Technology in PMERL**

Technology enhances efficiency and accuracy in PMERL processes. As a commitment to modernization and scalability, VOLUNTEERS will leverage appropriate digital tools for data collection, analysis, reporting, and dissemination.

Technological Tools:

- Mobile-based data collection (e.g., KoboToolbox, ODK)
- Data dashboards and visualization platforms
- Online reporting portals
- Learning management systems

VOLUNTEERS will assess the digital readiness of each project and provide necessary training and equipment. Volunteers will commit to using digital tools responsibly and securely to optimize PMERL outcomes.

**18. Integration of Gender, Disability, and Social Inclusion (GEDSI)**

Inclusive programming ensures that no one is left behind. As a commitment to equity and social justice, VOLUNTEERS will integrate GEDSI principles throughout the PMERL system.

Integration Strategies:

- Disaggregated data collection (by age, gender, disability, etc.)
- Inclusion checklists during planning and evaluations
- Community engagement that prioritizes marginalized voices
- Inclusive feedback mechanisms

VOLUNTEERS will ensure that programs identify and address barriers faced by underrepresented groups. Volunteers will commit to upholding inclusion principles in all data collection, reporting, and evaluation activities.

**19. Ethical Standards and Do No Harm**

Ethics are central to credible and safe PMERL practice. As a commitment to principled service delivery, VOLUNTEERS will uphold high ethical standards in all PMERL activities, guided by the principles of "Do No Harm."

Ethical Guidelines:

- Informed consent in data collection
- Anonymity and confidentiality
- Responsible data sharing and publication

- Avoidance of harm through culturally sensitive methods

VOLUNTEERS will train all personnel on ethical protocols and monitor adherence. Volunteers will commit to respecting the rights and dignity of individuals and communities involved in PMERL activities.

**20. Continuous Improvement and Institutionalization**

PMERL is not a one-time activity, but an evolving system. As a commitment to excellence and sustainability, VOLUNTEERS will continuously strengthen PMERL integration into its structure, policies, and practices.

Institutionalization Strategies:

- Regular PMERL reviews and updates
- Budgeting for PMERL in all proposals
- Embedding PMERL in performance evaluations
- Establishing dedicated PMERL units or focal points

VOLUNTEERS will monitor and refine the PMERL system based on evidence and learning. Volunteers will commit to championing PMERL practices in their roles, fostering a culture of accountability and performance throughout the organization.

**Annex: Key Tools and Templates for PMERL**

As part of their commitment to a standardized, efficient, and participatory PMERL system, VOLUNTEERS will use the following expanded tools and templates across all programmatic levels:

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**1. Project Logframe Template**

| Objective Level | Statement | Indicator | Baseline | Target | Means of Verification | Assumptions/Risks |
|---|---|---|---|---|---|---|
| Goal | | | | | | |
| Outcome | | | | | | |
| Output | | | | | | |
| Activities | | | | | | |

**2. Annual Work Plan and Budget (AWPB)**

| Activity | Responsible Person | Timeline | Resources Needed | Budget (USD) | Milestone/Indicator |
|---|---|---|---|---|---|
| | | | | | |
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| | | | | | |

**3. Activity Monitoring Form**

- Project Name & Code:
- Date:
- Activity Description:
- Location:
- Number of Participants (disaggregated by gender & age):
- Outputs Achieved:
- Observations:
- Challenges:
- Recommendations/Next Steps:

## 4. Monthly/Quarterly Progress Report Template

- Project Title:
- Reporting Period:
- Prepared by:
- 1. Executive Summary
- 2. Key Progress Against Targets (use table format)
- 3. Budget Utilization
- 4. Implementation Challenges and Solutions
- 5. Lessons Learned
- 6. Recommendations for Next Period

## 5. Evaluation Terms of Reference (ToR) Template

- Background & Context
- Purpose & Objectives of the Evaluation
- Evaluation Questions
- Methodology & Approach
- Scope & Limitations
- Timeline & Deliverables
- Evaluator Roles & Qualifications
- Budget & Resources

## 6. Data Quality Assessment (DQA) Checklist

| Data Quality Dimension | Criteria | Met (Y/N) | Comments |
|---|---|---|---|
| Accuracy | | | |
| Timeliness | | | |
| Completeness | | | |
| Consistency | | | |
| Confidentiality | | | |

### 7. Community Feedback and Complaint Log

| Date | Feedback Type | Description | Source | Action Taken | Response Date | Status |
|---|---|---|---|---|---|---|
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### 8. Learning Documentation Template

- Project Name:
- Period Covered:
- What Worked Well (Successes):
- What Did Not Work (Challenges):
- Why These Outcomes Occurred:
- Lessons Learned:
- Recommendations for Future Programs:

### 9. Risk Register Template

| Risk Description | Likelihood (1–5) | Impact (1–5) | Risk Level | Mitigation Strategy | Responsible | Status |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
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| | | | | | | |

### 10. Beneficiary Registration Form

- Full Name:
- Gender:
- Age:
- Location:
- Disability Status (Y/N, Specify):
- Services Received:
- Phone (optional):

- Consent for Data Use (Signed/Thumbprint):

**11. Inclusive PMERL Checklist**

| Question (Samples Only) | Response (Y/N) | Notes |
|---|---|---|
| Are women, youth, and PWDs represented in planning sessions? | | |
| Is data disaggregated by sex, age, and disability? | | |
| Are project activities accessible to all? | | |
| Are feedback mechanisms inclusive and accessible? | | |

**12. PMERL Orientation Training Package**
Contents:

- **Presentation Slides:** Overview of PMERL concepts and VOLUNTEERS framework
- **Facilitator Guide:** Session plan, objectives, discussion prompts
- **Pre/Post Test Template:** 10 multiple choice questions assessing knowledge gained
- **Reference Materials:** PMERL glossary, reading list, handouts

These tools will be digitized and stored in the central VOLUNTEERS PMERL repository. Volunteers will commit to using these templates accurately, consistently, and ethically to uphold the quality and accountability of the organization's programs.

**End of Annex**

**End of PMERL Handbook**

