



STANDARD OPERATING PROCEDURE

CHIEF DIRECTORATE: STRATEGY & SYSTEMS

DIRECTORATE: MONITORING & EVALUATION SERVICES

SOP Title

MONITORING STANDARD OPERATING PROCEDURE

SOP Number:

SOP/ M&E 01/2025

PURPOSE:

The purpose of the SOP is to detail the regularly recurring/ repetitive work processes that are conducted or followed within the monitoring and evaluation processes and promotes consistent work performance and predictable results.

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SCOPE:

This SOP is applicable to every official working in the M&E directorate. The directives of the SOP must be adhered to by all SMS members.

RESPONSIBILITY:

- M&E practitioners responsible for data collection, verification and consolidation.
- Deputy Director responsible for monitoring and reporting.
- Director M&E responsible for review of all reports and recommendation of deviation memoranda.
- SMS responsible for performance reporting, narrative reports and POE
- Chief Directors responsible for submission of quality checked performance reports, narrative reports and POE by the due dates

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PROCEDURE:

No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation	Service Standard
1.	Monitoring	Prepare expected evidence control sheets and templates and provide same to the SMS	Director: M&E	Quarterly	Annual Performance Plan, OP Plan and TIDs, QPR	
2.		Collect, collate and store POE, and index the files on a quarterly basis	M&E champions	Quarterly	Narrative Reports; QPR	
3.		Review the POE files before submission to M&E	Directors	Quarterly	Narrative Reports; QPR	
4.		Quality check and approve the POE files and submit the files by the due date after the closure of the quarter	Chief Directors	Quarterly	Narrative Reports; QPR	
5.		Receive POE files from the SMS/ delegated M & E Champion and check the submitted POE for validity, reliability and completeness.	M&E Practitioners Deputy Directors: M&E	Quarterly	Narrative Reports; QPR	
6.		Prepare and submit validation report to Director M&E for review by the 25th after the closure of a quarter	Deputy Directors: M&E Services	Quarterly	Narrative Reports; QPR	
7.		Review and sign the validation report	Director: M&E	Quarterly	Narrative Reports; QPR	
8.		Quality checks the validation report and sign	Chief Director: Strategy & Systems	Quarterly	Narrative Reports; QPR	
9.		Submit validation report for sign off by HOD	Director M&E	Quarterly	Narrative Reports; QPR	

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No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation	Service Standard
10.		Validation report to be presented in the Chief Directorate and Branch performance review sessions.	Director M&E	Quarterly	Narrative Reports; QPR	
11.		Validation report to be presented in the Departmental review session.	Director M&E	Quarterly	Narrative Reports; QPR	
12.		Resolutions regarding presented validation report are taken in the review session and must be adhered to.	Director M&E	Quarterly	Narrative Reports; QPR; Presentations by Branches	
13.		Joint quality assurance session is conducted to review POE	Director M&E	Quarterly	Narrative Reports; QPR and POE	
14.		Feedback is provided to all Programmes and DSCs	Director M&E	Quarterly	JQA Findings; POE and Validation reports	

REVIEW AND REVISION:

The SOP will be reviewed as and when there are changes to the Government systems and related legislation

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CONTINGENCIES:

No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation
1.	Non submission of NR, QPR and POE	Develop a list of non-submissions	Director M&E	Quarterly	Validation reports; submission registers per Programme and DSC
2.		Develop a report to the DDGs; Chief Directors, the CFO and HOD for action	Director M&E	Quarterly	Validation reports; submission registers per Programme and DSC

REFERENCES:

TYPE OF REFERENCE	REFERENCE
Policy	<ul style="list-style-type: none"> • M&E Policy • Quality Assurance Policy
Frameworks	<ul style="list-style-type: none"> • Revised Framework on Development of SP and APPs • Guidelines on the Development of SP and APPs • Government Wide Monitoring and Evaluation Framework • National Planning Evaluation framework
Act / Legislation	<ul style="list-style-type: none"> • PFMA • Public Audit Act • Public Service regulations • Treasury Regulations

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DEFINITIONS

Acronyms:

AGSA – Auditor General of South Africa

DPME-Department of Planning, Monitoring and Evaluations

PT- Provincial Treasury

APP – Annual performance Plan

SP- Strategic Plan

CFO – Chief Financial Officer

DDG – Deputy Director General

GWME – Government Wide Monitoring and Evaluation Framework

OP Plan – Operational Plan

SOP – Standard Operating Procedure

M&E – Monitoring and Evaluation

MFMA – Public Finance Management Act

NR – Narrative Report

QPR – Quarterly Performance Report

POE – Portfolio of Evidence

TIDs – Technical Indicator Description

SMS – Senior management service

HOD – Head of Department

OMEC- Office of the Member of Executive Council

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DSC- District Support Centre

ATTACHMENTS:

- M&E Policy
- Quality Assurance policy
- National Evaluation Framework

HISTORY OF CHANGE: <State in sufficient detail what changes were made what parts of the SOP were effected & when the changes become effective>

CERTIFICATION OF DUE PROCESS:

Prepared by: Mrhali Z
Name



Signature

20/04/ 2026
Date

Certified by: MADOLO S.S
Name



Signature

20/04/2026
Date

