



Governorate: _____

Idara: _____

**Boards of Trustees,
Parents and Teachers
*Assessment Tool***

School: _____

Governorate: _____

District: _____

Village/ Hamlet/ Suburb: _____

Administration Dates: _____

Number of participants: **From the Board** _____
From the committees _____
Others _____

**Guiding Manual
for implementing
BOTPT Assessment Tool**

INTRODUCTION

At the outset of its work, the ERP BOT team, in participation with the Social work Department and the Partner NGO, developed the BOT Performance indicators tool which had been used previously with the Board of Parents and Teachers to match the BOTs' roles and objectives. On the light of the lessons learned by applying this tool and the National Education Standards especially in the community participation, the social work supervisors of the ERP schools were trained on administering the tool and get the required results from it.

The tool had been implemented in all the BOTs of the ERP schools in the seven governorates since 2004.

Through the tool implementation, a demand for reviewing the tool appeared especially after using and applying it with the BOTs and also with having the new BOT decree No-334 for 2006.

Based on that a number of workshops had been conducted through July 2006 where the social work supervisors on Idarra and Muddiriya levels, BOTs representatives, Social workers representatives and School Principals participated to review the tool based on the field practicing.

These workshops had been conducted with the support and participation of the social work general department and the Social work advisor's Ministry office. Also representatives from NSP and Primary Education support participated in some of those workshops. Their comments and recommendations are also included in this modified version of the tool.

The Goal of the BOTAT:

- Assess the BoTPT Institutional needs and design a BoTPT capacity-building plan, accordingly;
- engage BoTPT members in reviewing and assessing their BoTPT annual performance (self-assessment),
- Gauge the level of BoTPT progress and performance improvement.
- Acquaint the difficulties that hampered the effective performance of the BOTPT.
- Stimulate the BOTPT awareness about the required effective performance that should be demonstrated by it.

Logic of the tool's design

The BoTPT tool is specifically designed putting into consideration the basic elements required for the BOTPT to be an institutional entity that achieves the goal targeted by its existence.

The tool focuses on gauging the progress in the status of work systems inside the BOTPT and its sustainability in spite of changing its entire members. It also whips part of the knowledge, skills and trends of the BOTPT members.

Tool components:

1. Guiding manual about administering the tool that includes: suggested steps for administering the tool, verification methods, glossary of terms used in the tool.

2. The tool itself consists of three main components: Governance, entire BOTPT work systems, External relationships,
3. A group of standards for each main component that express the contents of these components,
4. four indicators for each standard that express a descriptive grid,
5. Report model that gives a quantitative and qualitative analysis for the tool results
6. A model for the BOTPT building capacities plan.

Tool Users:

- BoTPT members, Social Work Department with all its different levels.

Tool Administration Timeline

The BOTAT will be administered on an annual basis in the month of August at least.

Principles that should be put into consideration during the tool application

1. Ownership

The Board members should trust the tool and its results; they should also adapt plans for improving their performance So that they should apply the tool based on a complete understanding to all its aspects and a trust in its outputs.

2. Participation

All the board members should participate in the tool implementation and in analyzing its results and putting the capacity building plan. As without this participation there will not be any performance improvement.

3. Credibility

The board members have to be realistic in assessing their performance and the performance assessment should reflect the actual BOTPT performance, without doing this the board performance couldn't be gauged.

4. awareness Building

The tool is not just a routine work that should be done; it is a tool to build the board awareness about how it should be, not only this but also to show its current status compared with the perfect required one.

Characteristics of Session Facilitator

- Well acquainted with the BOTPT decree
- Well acquainted with the tool, its contents and how to analyze the results
- Demonstrated experience in putting a capacity building and improving performance plan
- Demonstrated strong communication and facilitation skills

Proposed Steps for BOTPT Tool Administration

The tool administration depends on holding a discussion about the indicators that are included in the tool between all the board members thus the Social worker's role becomes to facilitate the discussion and enable the board members to evaluate their performance accordingly. The facilitator should always assure on using the verification methods before reaching a consensus about the board level for each indicator.

The following steps could be followed for the tool administration

1. The social worker in coordination with the social work supervisor will make sure of the well understanding to the tool content.
2. The social worker will design a plan with the BOTPT for the tool administration.
3. The tool will be administered with each BOTPT separately on a condition of 80% -at least -attendance from the BOTPT members and representatives

from the BOTPT sub-committee (in particular non-BOTPT members). It is crucial to highlight that the role of the social worker is to facilitate the session

4. The social worker will hold an introductory session to the BOTPT members to:
 1. Explain the goals of the BOTAT.
 2. Explain the overall guidelines of the tool.
 3. Explain the concepts included in the tool.
 4. The BOTAT administration steps including application, analysis, BOTPT capacity building plan).
 5. Start with a presentation about each standard and its indicators; discuss it to make sure that it is well understood by all participants. Then choose the indicators that express the current situation of the board's performance which should be agreed by all the attendees. Make sure about each answer using the verification methods with a special interest for the documents quality.
 6. The comments part which exists at the end of each standard is used to write more clarification about the chosen indicator or to add some BOTPT notes about a certain standard.
 7. BOTAT analysis: After going through all the standards included in the tool the social worker facilitates the analysis process of the BOTAT in coordination with the entire board members. The score for each of the categories, as well as the overall score, will be calculated, according to the scoring grid included at the end of the tool.
 8. The scoring grid is completed with the tool results as follows:
 - According to the percentages of each category the categories are arranged in an ascending order (from weaker to stronger).
 - Each category can be analyzed separately to identify the weakest standards that has a degree 1-2.
 - The BOTPT suggestions could then be written to improve these weakness points which express the institutional needs of the board.
 9. The social worker in coordination with the BOTPT should identify the priorities from these institutional needs which have been recorded in the last table and which the board will work for the next year on developing it.
 10. The social worker uses the grid model in the end of the tool to design a building capacity plan for the BOTPT based on these priorities. Before designing the plan it is recommended to review the previous board plan and the technical support trainings which had already given to it. This plan should be included in the school annual plan.
 11. The social worker keeps a copy of the tool that includes the report and the capacities building plan.
 12. The social work supervisor gives the technical support required for the social worker to administer the tool, receive the BOTPT Building capacities plans, review it and give an opinion about it.
 13. The BOTPT Building capacities plans are reviewed periodically to assure the commitment in the implementation and if there are some changes happened, make the required modifications accordingly.

Tips for the Session Facilitator

- ✓ The facilitator should draw the attention of participants that the BOTPT Performance Indicators Tool is an effective vehicle designed to assess the current status of the BoTPTs, and not to test or examine the BOTPT performance and ability.
- ✓ The facilitator should lead a constructive discussion that emphasizes that the BOTAT is not designed to spot mistakes or find flaws with the BOTPT. The facilitator should emphasize the strengths of the BOTPT rather than the shortcomings.
- ✓ The facilitator should ask open-ended questions to stimulate discussion. In addition, the session facilitator should make use of examples that relate to the actual activities of the BOTPT, in order to make closer and simpler the concept of the BOTAT indicators.
- ✓ The facilitator should record and capitalize on any comments, observations, and information that might be highlighted during discussion. Such captured information and comments might be useful in analyzing findings and writing reports.
- ✓ If the responses solicited from participants are different, the facilitator should make sure that participants are able to develop one common and correct understanding of each indicator and then he might go back to the verification methods to rebate the situation.
- ✓ The facilitator should employ a variety of approaches to ensure the full engagement of participants into the discussions.
- ✓ The facilitator should discuss the feedback provided by the participants and should supply them with the resource materials needed for further reference. The final decision should be theirs. Remember, you are a facilitator and not an evaluator.
- ✓ The facilitator should not go into a debate with the participants; he shouldn't affect their choices towards his point of view. For example, don't show that you are convinced with what they say, don't show a special preferences towards any indicator even if that is to let them get a low degree and a higher technical support accordingly or to get a higher degree that shows how effective is the building capacities plan. That could accordingly affect the BOTPT members' interest and seriousness in applying the tool.

BOTAT Concepts and terminologies

| No | Item | Description |
|----|-----------------|--|
| 1 | Good Governance | <p>A group of concepts and BOTPT practices that enlarge and extend the participation of different levels of individuals, school members and general Assembly in decision making. In addition, it allows partial transparency and accountability for the decision makers</p> <p><u>Principles of good governance</u></p> <ul style="list-style-type: none"> • Clear goal • Participation • Accountability • Transparency • BOTPT elections and taking the leadership • Clear roles for the BOTPT members • Representing grassroots |
| 2 | Society | <p>The word society is used in the tool to refer to all the institutions in the society either it was governmental institutions, civil society institutions, private sector or individuals.</p> |
| 3 | Civil Society | <p>There are many definitions for that word like: the totality of free voluntary organizations that fill in the general field between the family and the country for the sake of its members and at the same time it is committed to the values and the standards of respect, forgiveness and the right management for conflict and variety". However there are some main themes that should exist:</p> <p><u>voluntary or free volition action</u> The individuals choose CSO's membership</p> <p><u>Organizational</u> It is an organized society where the organizations or the associations work in it procedurally and according to logical standards where its members are committed to pre-agreed roles and conditions.</p> <p><u>Manners and Behavior</u> Represented in accepting -peacefully and on the light of respect, forgiveness, cooperation competitions and peaceful conflict-variety, difference and commitment in conflict management inside and between the CSOs. The CS is used to refer to a huge number of NGOs and NPOs. These organizations exist in life and they take care of expressing values and interests either for its members or others based on moral, cultural, political, religious or voluntary concepts.</p> <p>The civil society refers to organizations or associations like: NGOs. Society development associations, specific unions, professional syndicates, charity organizations, religious associations, liberal unions and social clubs.</p> |
| 4 | Decision Making | <p>Specify and/or analyze the organizational and strategic problems and try to put different proposals for the solutions and to give the best alternatives from these</p> |

| | | |
|---|-----------------------------------|---|
| | | proposals and follow up to deliver it to the decision takers. |
| 5 | Decision taking | This is done by an individual/institution that has the power to choose the best alternatives from all the proposed solutions presented by the decision makers to solve a certain problem. The decision maker could be himself the decision taker. |
| 6 | System | A group of procedures, policies and tools that organize the work and specify the role players and their roles in an organized and integrated way. |
| 7 | Strategic Planning | It is the effort organized for making the critical decisions; it is also the effort that characterizes the school identity and the reason for its existence. It is a group of principles, steps and tools that were designed to help the school principal, BOTPT and the planners to think and act in a strategic way. It helps the school to make an effective decision that leads to achieving the school message and to get the satisfaction of all the counterparts. It is a process based on all the opportunities and threads surrounding the school from the external environments to the strength and weakness points in its internal environment, it includes: putting and specifying the school vision and mission, studying the school internal and external environment and putting the strategic objectives. |
| 8 | Building institutional capacities | Building institutional capacities is defined as: it is the support given to the organization to be able to do its mission efficiently and achieve its goals which it has been established for it. It is also considered a sustainable process that includes resources development by all its types: human, institutional, financial and informative. |

BOTPT Assessment Tool

First Main Component Good Governance

| 1. parents' Attendance during GA ordinary meeting | | | | Means of Verification |
|---|---|---|---|----------------------------|
| 1 | 2 | 3 | 4 | |
| 1. The GA doesn't convene. | | | | GA report with attachments |
| 2. The GA convenes, with an average turnout of 25% - 50%. | | | | |
| 3. The GA convenes, with an average turnout of 51% - 75%. | | | | |
| 4. The GA convenes, with an average turnout of +75%. | | | | |
| Comment | | | | |
| Write about who did awareness raising and publicity for the GA meeting-the actual attendance percent. | | | | |

| 2. Electing BOTPT parents' representatives by the GA | | | | Means of Verification |
|---|---|---|---|----------------------------|
| 1 | 2 | 3 | 4 | |
| 1. The BOTPT is formed through recruitment (appointment), without convening the GA. | | | | GA report with attachments |
| 2. The GA convenes, but the BOTPT is formed uncontested | | | | |
| 3. The GA convenes, and the BOTPT is democratically elected by showing hands | | | | |
| 4. Democratic election of BOTPT, with secret ballot. | | | | |
| Comment | | | | |
| | | | | |

| 3. Number of parents nominated themselves for the BOTPT membership | | | | Means of Verification |
|--|---|---|---|----------------------------|
| 1 | 2 | 3 | 4 | |
| 1. None of the parents nominated himself for the BOTPT membership and the school put its own slate. | | | | GA report with attachments |
| 2. 5 parents only nominated themselves for the BOTPT membership and they won unopposed | | | | |
| 3. 7 parents nominated themselves for the BOTPT membership and a ballot was casted where 5 of them were chosen. | | | | |
| 4. More than 7 parents nominated themselves for the BOTPT membership and a ballot was casted where 5 of them were chosen | | | | |
| Comment | | | | |
| The comment should include the number of nominated parents. | | | | |

| 4. Representation of women in the BOTPT (either membership or interest) | | | | Means of Verification |
|--|---|---|---|-----------------------|
| 1 | 2 | 3 | 4 | |
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| 1. There is no representation of women on the BOTPT, neither from parents nor community members interested in education. | <ul style="list-style-type: none"> • BOT profile report • BOT by-laws |
| 2. Only one parent woman is included on the BoTPT, either from parents or community members interested in education | |
| 3. Two parent women are included on the BoTPT, either from parents or community members interested in education. | |
| 4. Three or more parent women are included on the BoTPT, either from parents or community members interested in education. | |
| Comment | |
| (indicate whether the female elements are elected or selected): | |

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| 5. The BoTPT members are acquainted with their roles and responsibilities in the light of the BOTPT decree | Means of Verification | | | | |
| <table border="1"> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </table> | 1 | 2 | 3 | 4 | |
| 1 | 2 | 3 | 4 | | |
| 1. BoTPT members are not acquainted with their roles nor their responsibilities in the light of the BOTPT decree | | | | | |
| 2. BOTPT members can mention only two of their roles and responsibilities according to the BOTPT, they could explain it as well. | | | | | |
| 3. The BOTPT members can mention most of their roles and responsibilities according to the BOTPT decree and they can explain it as well. | | | | | |
| 4. The BOTPT members can mention all of their roles and responsibilities as it is in the BOTPT decree and explain it as well. | | | | | |
| Comment | | | | | |
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|---|------------------------------|----------|----------|----------|--|
| 6. Decision making inside the BOTPT: | Means of Verification | | | | |
| <table border="1"> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </table> | 1 | 2 | 3 | 4 | |
| 1 | 2 | 3 | 4 | | |
| 1. All the decisions are a posterior approval on what the school management previously did. | BOT Meetings' minutes | | | | |
| 2. The subjects that need a decision are presented to the BOTPT however the decisions are taken by one individual. | | | | | |
| 3. the subjects that needs a decision are presented to the BOTPT to be discussed by the BOTPT members before taking a decision | | | | | |
| 4. The subjects that need a decision are presented to the BOTPT to be discussed by the BOTPT members before taking a decision which is taken by voting. | | | | | |

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| Comment | |
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|---|---|----------|----------|----------|--|
| 7. Announcing the decisions taken by the BOTPT | Means of Verification | | | | |
| <table border="1"> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </table> | 1 | 2 | 3 | 4 | |
| 1 | 2 | 3 | 4 | | |
| 1. Neither the BOTPT meetings minutes nor the decisions taken are announced. | Used methods to present decisions and meetings minutes to the parents | | | | |
| 2. The meetings minutes and the decisions taken are announced but not periodically. | | | | | |
| 3. The meetings minutes and the decisions taken are announced periodically in a seen place for all the staff and the visitors as well. | | | | | |
| 4. The meetings minutes and the decisions taken are announced periodically in a seen place for all the staff and the visitors as well. Parents are informed by the important decisions. | | | | | |
| Comment | | | | | |
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|---|---|----------|----------|----------|--|
| 8. The BOTPT reports are accessible for both its members and the GA members | Means of Verification | | | | |
| <table border="1"> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </table> | 1 | 2 | 3 | 4 | |
| 1 | 2 | 3 | 4 | | |
| 1. the reports are not accessible to the BOTPT members. | Reports that include activities implemented by the BOTPT to present their reports | | | | |
| 2. The reports are accessible only for the Chief of the BOTPT, the school principal or a number of the BOTPT members. | | | | | |
| 3. The reports are accessible to all the BOTPT members. | | | | | |
| 4. The BOTPT presents the reports and make it accessible for all its members and for the GA members as well. | | | | | |
| Comment | | | | | |
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|--|---|----------|----------|----------|--|
| 9. BOTPT involving parents in its activities | Means of Verification | | | | |
| <table border="1"> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </table> | 1 | 2 | 3 | 4 | |
| 1 | 2 | 3 | 4 | | |
| 1. BOTPT don't involve parents in its activities | Activities reports that shows the activities implemented by the BOTPT | | | | |
| 2. parents participation in BOTPT activities is unplanned | BOTPT and committees' plans | | | | |
| 3. Parents participation in BOTPT activities is planned where they have specific roles | Committees' membership | | | | |
| 4. parents participate in planning and implementing the BOTPT activities in a planned way where they | | | | | |

| | |
|---|--|
| have specific roles | |
| Comment | |
| (please give clear examples for parents' participation in implementing BOTPT activities): | |

| 10. BOTPT has reconnaissance tools and methods to know parents opinion about its activities and accomplishments | | | | Means of Verification |
|---|----------|----------|----------|--|
| 1 | 2 | 3 | 4 | |
| 1. BOTPT don't reconnoiter for parents opinions | | | | Used tools and questionnaires to collect feedback |
| 2. BOTPT reconnoitering parents opinions when necessary | | | | Questionnaire results reports |
| 3. BOTPT uses different tools and methods to reconnoitering parents opinions, but the process goes randomly | | | | Minutes of meetings the reflects discussions about these results |
| 4. There is a system for reconnoitering parents' opinions, analyzing it and discussing it inside the BOTPT meetings to take the required decisions. | | | | |
| Comment | | | | |
| (please give examples for some of opinion reconnaissance tools and methods): | | | | |

Second Main Component BOTPT Work Systems

First: Information Management System

| 11. BOTPT has a detailed database for its surrounding community | | | | | Means of Verification |
|---|---|---|---|--|---|
| 1 | 2 | 3 | 4 | | |
| 1. BOTPT doesn't collect any data about the surrounding community | | | | | Database |
| 2. BOTPT collect data about its surrounding community when necessary | | | | | Report about implemented activities/made decisions using the database |
| 3. The BOTPT is preparing a detailed database about the community but it is not an updated one and there is no system to use it or got benefit from it. | | | | | |
| 4. The BOTPT is preparing an updated detailed database about the surrounding community and there is a system to use it and get benefit from it. | | | | | |
| Comment | | | | | |
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| 12. BOTPT has a database for the GA members | | | | | Means of Verification |
|--|---|---|---|--|-----------------------|
| 1 | 2 | 3 | 4 | | |
| 1. BOTPT doesn't have any written data about the GA members | | | | | Data Base |
| 2. General data about the GA members exists only at the school administration through the students' files. | | | | | GA report |
| 3. BOTPT has a database for the GA members but it is not an updated one | | | | | |
| 4. BOTPT has a database for the GA members, it is updated periodically. | | | | | |
| Comment | | | | | |
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| 13. The BOTPT has an operational and accurate filling system | | | | | Means of Verification |
|--|---|---|---|--|--|
| 1 | 2 | 3 | 4 | | |
| 1. BOTPT doesn't have any files. | | | | | Filling system |
| 2. BOTPT has files but they are unorganized and incomplete. | | | | | BOTPT members are acquainted by the filling system |
| 3. There is a filling system but it is not a functional one. | | | | | |
| 4. The BOTPT has an integral, accurate file-keeping system in place, which is easy to access data through. | | | | | |
| Comment | | | | | |
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Second: BOTPT Meeting Management System

| 14. There is a functional system for conducting BOTPT meetings | | | | Means of Verification |
|--|----------|----------|----------|--|
| 1 | 2 | 3 | 4 | |
| 1. No BOTPT management system exist | | | | A written system for conduct meetings |
| 2. A BOTPT management meeting system exists in-writing, but not well-functioning | | | | A pre-sent invitations for attending some of the meeting |
| 3. A BOTPT management meeting system exists in-writing, but without being adhered to (i.e. The BOTPT meeting agenda is developed ahead of time, but items thereon are not discussed) | | | | |
| 4. A BOTPT management meeting system exists in-writing, and items thereon are adhered to. | | | | |
| Comment | | | | |
| | | | | |

| 15. BOTPT meetings minutes | | | | Means of Verification |
|--|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. BOTPT meeting minutes are not taken or kept. | | | | Meeting minutes |
| 2. BOTPT meeting minutes are taken and kept, but not on a regular basis, and do not do not reflect discussions held. | | | | |
| 3. BOTPT meeting minutes are taken and kept on a regular basis, but do not reflect discussions held. | | | | |
| 4. BOTPT meeting minutes are taken and kept on a regular basis, and reflect discussions held. | | | | |
| Comment | | | | |
| | | | | |

| 16. Attendance of the BOTPT meetings | | | | Means of Verification |
|--|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. less than 25% of the BOTPT members are regularly attending the monthly meetings | | | | Meetings minutes |
| 2. 26%-50% of the BOTPT members are regularly attending the monthly meetings | | | | |
| 3. 51%-75% of the BOTPT members are regularly attending the monthly meetings | | | | |
| 4. more than 75% of the BOTPT members are regularly attending the monthly meetings | | | | |
| Comment | | | | |
| | | | | |

| 17. BOTPT members monitor decisions made during BOTPT meetings | | | | | Means of Verification |
|---|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. No BoTPT decisions, taken during BoTPT meetings, are monitored by BoTPT members | | | | | Meetings minutes |
| 2. No more than 25% of BoTPT decisions, taken during BoTPT meetings, are monitored by BoTPT members | | | | | Achievements reports |
| 3. 26 – 75% of BoTPT decisions, taken during BoTPT meetings, are monitored by BoTPT members. | | | | | |
| 4. +75% of BoTPT decisions, taken during BoTPT meetings, are monitored. | | | | | |
| Comment | | | | | |
| | | | | | |

Third: Planning

| 18. BOTPT ability to do a needs assessment in collaboration with the school administration and the grassroots | | | | | Means of Verification |
|---|----------|----------|----------|--|--|
| 1 | 2 | 3 | 4 | | |
| 1. BOTPT neither make any needs assessment nor receive any support requests from the school administration | | | | | a written and well known system for receiving the support requests |
| 2. BOTPT don't make any needs assessment but only receives the school support requests to be included in its plan. | | | | | Needs Assessment report |
| 3. The BOTPT assess the school needs, discuss it with the school administration and receive the school support requests to be included in his plan | | | | | |
| 4. There is a functioned system for needs assessment and for receiving the school support request and this happens in collaboration with the school management and the grassroots | | | | | |
| Comment | | | | | |
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| 19. BOTPT work plans | | | | | Means of Verification |
|---|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. No BOTPT plans exist | | | | | School strategic plan |
| 2. BOTPT produce a short-term plan, for no more than 1-3 months | | | | | BOTPT and School SIP |
| 3. The BOTPT produces an annual plan which is transformed to an interim implementation plans (quarterly-monthly) interim, annual plan | | | | | |
| 4. BOTPT produce a strategic plan and produce an annual plan accordingly | | | | | |

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| Comment | |
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| 20. BOTPT specify and distribute roles to implement the annual work plan | | | | Means of Verification |
|---|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. There is no roles specification or distribution in the implementation of the annual work plan | | | | Annual Work Plan |
| 2. There is an in-written role specification and distribution but it is only on papers, unknown to the BOTPT members nor the implementers | | | | Monthly Work Plan |
| 3. There is an in-written roles specification and distribution it is | | | | Committees' plans |
| 4. BOTPT produce a strategic plan and produce an annual plan accordingly | | | | |
| Comment | | | | |
| | | | | |

| 21. BOTPT is committed to implement and review the work plans | | | | Means of Verification |
|---|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. BOTPT is not committed to the work plan | | | | Achievements reports |
| 2. BOTPT implements some of the activities included in the work plan. | | | | Meetings minutes |
| 3. BOTPT implements the work plan completely but without monitoring no revision. | | | | |
| 4. BOTPT implements the work plan completely and it also review and monitor its implementation. | | | | |
| Comment | | | | |
| | | | | |

| 22. Quality of BOTPT Plans | | | | Means of Verification |
|---|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. The BOTPT plan doesn't include the basic elements for any plan (Objective-activity-outcome-time frame-person in charge-budget). It is contains only items of expenses. | | | | Annual Work Plan |
| 2. The BOTPT plan has some basic plan elements, however these elements are scattered and not related to each others. | | | | Monthly Work Plan |
| 3. The BOTPT plan has all the basic plan elements, however these elements are scattered and not related to each others. | | | | |
| 4. The BOTPT plan has all the basic plan elements, and its elements are integrated and related to each others | | | | |
| Comment | | | | |
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| 23. Committees Work | | | | | Means of Verification |
|--|----------|----------|----------|--|---|
| 1 | 2 | 3 | 4 | | |
| 1. No BOTPT committees exist. | | | | | Report about forming committees, its roles and membership |
| 2. The BOTPT committee exist only on papers and they don't have specific roles. | | | | | Minutes of the committees meetings |
| 3. There are BOTPT committees, they have specific role, they meet regularly but they don't have written plans for their activities. | | | | | Committees plans and achievements reports |
| 4. There are BOTPT committees, they have specific role, they meet regularly and they implement a written and clear plans for their activities. | | | | | |
| Comment | | | | | |
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Fourth: Monitoring and Evaluation System

| 24. BOTPT M&E system (M&E plans- M7E happens periodically-distributing roles and responsibilities-How to use the results-Reports systems) | | | | | Means of Verification |
|--|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. There is no BOTPT M&E system. | | | | | M&E system |
| 2. There is a BOTPT M&E system but it is not documented and the BOTPT members are not abiding by it. | | | | | M&E plan |
| 3. There is a documented BOTPT M&E system but the BOTPT members are not abiding by it. | | | | | M&E Reports |
| 4. There is a documented BOTPT M&E system and the BOTPT members are abiding by it. | | | | | |
| Comment | | | | | |
| | | | | | |

| 25. Preparing a periodical BOTPT reports | | | | | Means of Verification |
|--|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. The BOTPT doesn't prepare any written reports about the implemented activities. | | | | | Achievements reports |
| 2. The BOTPT only prepares the final report to present it to the GA during its annual meeting. | | | | | |
| 3. The BOTPT prepares a detailed written reports about the activities implemented all over the year but in a non-periodically basis. | | | | | |
| 4. The BOTPT prepares a detailed written reports about the implemented activities on a monthly basis. | | | | | |
| Comment | | | | | |
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| 26. BOTPT is evaluating its performance and design improvement plans accordingly | | | | Means of Verification |
|---|----------|----------|----------|--|
| 1 | 2 | 3 | 4 | |
| 1. BOTPT Doesn't evaluate its performance. | | | | BOTAT |
| 2. BOTPT evaluate its performance however it doesn't conduct any improvement activities. | | | | BOTPT plan for performance improvement |
| 3. BOTPT evaluate its performance and conduct some random activities to improve it. | | | | A report to analyze the tool's results |
| 4. BOTPT evaluate its performance and put an improvement plan for regular performance improvement | | | | |
| Comment | | | | |
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Fifth: Financial Systems

| 27.The financial auditor is well-functioning: | | | | Means of Verification |
|---|----------|----------|----------|---|
| 1 | 2 | 3 | 4 | |
| 1. The financial auditor doesn't have the required forms/tools that show him the required taken actions and followed procedures (procedures checklist-filled forms to proceed with the financial monitoring of the BOTPT expenses). | | | | Financial Auditor reports |
| 2. The financial auditor has the required forms/tools (procedures checklist- filled forms to proceed with the financial monitoring of the BOTPT expenses) however he doesn't use them. | | | | The tools and forms used by the financial auditor |
| 3. The financial auditor has the required forms/tools (procedures checklist- filled forms to proceed with the financial monitoring of the BOTPT expenses) which he uses but without documenting in the observation report. | | | | |
| 4. The financial auditor has the required forms/tools (procedures checklist- filled forms to proceed with the financial monitoring of the BOTPT expenses)which he uses and documents in the observation report in order to be discussed with the BOTPT. | | | | |
| Comment | | | | |
| | | | | |

| 28.The financial procedures are well-functioning and guarantee transparency in the BOTPT performance: | | | | Means of Verification |
|--|----------|----------|----------|------------------------------|
| 1 | 2 | 3 | 4 | |
| 1. All the financial expenses are made without the BOTPT revision. However they are presented after the expenditure. | | | | Expenditure documents |
| 2. Most financial expenses are made without the BOTPT revision however they are presented after the expenditure. Also some of these expenses are not applicable to the BOTPT plan. | | | | BOTPT meetings' minutes |
| 3. Most financial expenses are made after the approval of the BOTPT and its ratification of the expenditure notes. Few of them are not applicable to the BOTPT plan | | | | |
| 4. Most financial expenses are made after the approval of the BOTPT and its ratification of the expenditure notes. This is done before any expending step. | | | | |
| Comment | | | | |
| | | | | |

| 29.BoTPT ability on studying the available resources and develop a resources mobilization plan accordingly | | | | | Means of Verification |
|---|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. BoTPT is not acquainted about how to do a resources mobilization. | | | | | Stakeholders map |
| 2. BoTPT did some studies for the available resources (internally and externally). | | | | | Resources mobilization plan |
| 3. BoTPT has a written clear plan for developing and mobilizing the available resources (internally and externally), this plan is developed based on the BOTPT studies in this regards. | | | | | |
| 4. BoTPT reviews and evaluate the resources mobilization plan on a regular basis and do the required modifications accordingly. | | | | | |
| Comment | | | | | |
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| 30.The BoTPT has expertise in resources mobilization (fundraising): | | | | | Means of Verification |
|---|----------|----------|----------|--|------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. The BoTPT never undertakes any fundraising or resources mobilization activities. | | | | | Financial reports |
| 2. The BoTPT fundraises 1-10% of resources defined, according to the School annual work plan. | | | | | Final account |
| 3. The BoTPT fundraises 11-25% of resources defined, according to the School annual work plan. | | | | | Financial records |
| 4. The BoTPT fundraises more than 25% of resources defined, according to the School annual work plan. | | | | | |
| Comment | | | | | |
| | | | | | |

Third Main Component Relationships and Linkages

| 31. Cross BoTPTs Relationships: | | | | | Means of Verification |
|--|----------|----------|----------|--|---|
| 1 | 2 | 3 | 4 | | |
| 1. No relationships with other BoTPTs exist. | | | | | Correspondences |
| 2. The BoTPT participates in meetings to exchange experiences with other BoTPTs. | | | | | Memorandum of understanding |
| 3. The BoTPT shares progress reports with other BoTPTs on a regular basis. | | | | | Minutes of conducted meetings |
| 4. The BoTPT carries out joint activities with other BoTPTs | | | | | Reports about common implemented activities |
| Comment | | | | | |
| Please put some clarification examples: | | | | | |

| 32.BoTPT relationship with other civil society organizations: | | | | | Means of Verification |
|--|----------|----------|----------|--|-------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. No communications between the BoTPT and other civil society organizations exist. | | | | | Correspondences |
| 2. The BoTPT Has a list of the CSOs that could serve the school, however they have never collaborated in any common activities. | | | | | Memorandum of understanding |
| 3. The BoTPT has a list of the CSOs that could serve the school. The BOTPT in collaboration with these CSOs implemented a number of meetings and activities. | | | | | Minutes of conducted meetings |
| 4. The BoTPT Has a list of the CSOs that could serve the school. The BOTPT in collaboration with these CSOs signed a cooperation agreement for implementing a common work plan | | | | | |
| Comment | | | | | |
| Please put some clarification examples | | | | | |

| 33.BoTPT relationship with the private sector | | | | | Means of Verification |
|---|----------|----------|----------|--|--|
| 1 | 2 | 3 | 4 | | |
| 1. No communications between the BoTPT and private sector exist. | | | | | Correspondences |
| 2. The BoTPT has a list of the private sector organizations that could serve the school. The BOTPT conducted some communications with these PSOs in order to get some services. | | | | | Memorandum of understanding |
| 3. The BoTPT has a list of the private sector organizations that could serve the school. These PSOs funded a number of activities that are included in AWP. | | | | | Minutes of conducted meetings |
| 4. The BoTPT has a list of the CSOs that could serve the school. The BOTPT in collaboration with these CSOs signed a cooperation agreement for implementing a common work plan. | | | | | Reports about support activities that have been implemented by the private sector for the school |
| Comments | | | | | |

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| Please put some clarification examples | |
|--|--|

| 34.BoTPT relationship with governmental departments | | | | | Means of Verification |
|--|----------|----------|----------|--|---|
| 1 | 2 | 3 | 4 | | |
| 1. No communications or areas of collaboration exist between BoTPT and governmental departments | | | | | Correspondences |
| 2. BoTPT members have personal relationships with some governmental departments, but are not optimally used to support BoTPT activities. | | | | | Memorandum of understanding |
| 3. A range of activities is carried out in collaboration with governmental departments, based on a personal, informal basis. | | | | | Minutes of conducted meetings |
| 4. There is regular, formal collaboration between the BoTPT and governmental departments, and is documented. | | | | | Reports about provided support by these authorities to the school |
| Comments | | | | | |
| Please put some clarification examples | | | | | |

| 35.BOTPT ability to produce communication materials (i.e. pamphlets, | | | | | Means of Verification |
|---|----------|----------|----------|--|----------------------------------|
| 1 | 2 | 3 | 4 | | |
| 1. The BoTPT never produces any communications materials | | | | | produced Communication materials |
| 2. Pamphlets are produced by the BoTPT, but only distributed upon request. | | | | | |
| 3. Communication materials are produced and distributed by the BoTPT in different occasions, but are not well-designed. | | | | | |
| 4. A variety of well-designed communication materials are produced and distributed by the BoTPT in different occasions. | | | | | |
| Comments | | | | | |
| Please put some clarification examples | | | | | |

Analyzing the tool results and developing the interventions plan

BOTPT PERFORMANCE INDICATORS NUMBER SCORE

| # | Item | Total Questions | Highest Possible Score | Attained Score | Percentage |
|--------------------|-------------------------------------|-----------------|------------------------|----------------|------------|
| I. | Good Governance | 10 | 40 | | |
| II. | BOTPT Work systems | 20 | 80 | | |
| III. | External relationships and linkages | 5 | 20 | | |
| Total Score | | 35 | 140 | | |

ANALYSIS REPORT ON TOOL FINDINGS

| <u>Component</u> | <u>Order according to percentage</u> | <u>Prioritized Weakness points based on the scores</u> | <u>Improvement suggestions</u> |
|-------------------------|---|---|---------------------------------------|
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Building Capacities Plan

| component | Indicator | problem description | time | person in charge | cost | expected results |
|-----------|-----------|---------------------|------|------------------|------|------------------|
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Completed By: _____
Position: _____
Date: _____

Reviewed and Approved By:

BoTPT Chairperson

Date

Executive Director

Date
