**Monitoring and Evaluation**

**Capacity Strengthening Workshop**

**Handouts**





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# Session 1: Workshop Overview

# Monitoring & Evaluation

**Capacity Strengthening Workshop**

*The goal of the M&E Capacity Strengthening Workshop is to strengthen the capacity of participants to monitor and evaluate programs for improved program effectiveness and efficiency.*

Workshop Objectives:

By the end of the workshop, participants will be able to:

* Summarize M&E terminology and have a sound understanding of the differences between monitoring and evaluation.
* Summarize the use of M&E data for program planning, management, and improvement.
* Identify ways to use M&E as both a means to manage and improve programs, in addition to reporting and accountability.
* State PEPFAR indicators and reporting requirements.
* Generate program-specific M&E plans, including program planning, program goals and objectives, an M&E results framework, program indicators, and data use.
* Identify the five threats to data quality and methods to minimize and manage such threats.

Monitoring & Evaluation Capacity Strengthening Workshop

[Venue / Program / Date]

Example Agenda

|  |  |  |
| --- | --- | --- |
| Time | Day 1 – February 5 | Facilitators |
| 9:00 – 9:30 | Workshop Welcome |  |
| 9:30–10:30 | Introduction and Workshop Overview |  |
|  | * **Welcome and introductions** * **Workshop purpose and objectives** * **Workshop Overview** * **Expectations, ground rules, notable quotes** * **Participant report back assignments** * **Emergency Plan overview** * **Pretest** |  |
| 10:30–11:00 | Tea Break |  |
| 11:00-12:00 | M&E Work Plan Overview   * **Components of an M&E Work Plan** * **Organization mission, goals and objectives** |  |
| 12:00 – 1:00 | M&E Work Plan Development: *Laying the Foundation* |  |
| 1:00 – 2:00 | Lunch Break |  |
| 2:00 – 3:30 | Introduction to Monitoring and Evaluation   * **Definitions and types of M&E** * **Types of M&E Activity** * **Importance of M&E** |  |
| 3:30-3:45 | Tea Break |  |
| 3:45-4:45 | M&E Frameworks   * **Introduction to M&E Frameworks** |  |
| 4:45-5:15 | M&E Work Plan Development: *Building Your Framework* |  |
| 5:15–5:30 | Wrap Up & Day’s Evaluation   * **Q&A, Housekeeping** * **Evaluations** |  |
| 6:00 | Welcome Reception |  |

***Working smarter, not harder***

|  |  |  |
| --- | --- | --- |
| Time | Day 2 - February 6 | Facilitators |
| 9:00-10:00 | Overview of Previous Day and Today’s Agenda   * **Review evaluations** * **Participant report back and Q&A** * **Overview of Day** * **M&E Definitions Activity** |  |
| 10:00 – 10:45 | Building a Framework:   * **Group Exercise: Building a Frameworks** * **Framework Examples** | **All** |
| 10:45-11:00 | Tea Break |  |
| 11:00 – 12:00 | M&E Work Plan Development | **All** |
| 12:00-1:00 | Lunch |  |
| 1:00 – 3:30 | Indicator Development   * **Overview of indicators** * **Indicator Exercise (The Rock)** * **Selecting indicators to measure (criteria and rationale) and brainstorming exercise** * **Key program indicators for Care, Treatment, and Prevention in SA** * **Emergency Plan Indicators** |  |
| 3:30-3:45 | Tea Break |  |
| 3:45-5:00 | Indicator Development   * **Indicator Development / Operationalize** * **Indicator Information Sheets** |  |
| 5:00–5:30 | Wrap Up & Day’s Evaluation   * **Q&A, Housekeeping** * **Evaluations** |  |

*“****Not everything that counts can be counted.***

***And not everything that can be counted, counts.”***

|  |  |  |
| --- | --- | --- |
| Time | Day 3 - Data Use Day – February 7 | Facilitators |
| 9:00-10:00 | Overview of Previous Day and Today’s Agenda   * **Review evaluations** * **Participant report back** * **Overview of Day** * **Proverbs** |  |
| 10:00 – 10:45 | Data Demand & Information Use   * **Overview & introduction** * **Principals of Data Demand & Information Use** |  |
| 10:45-11:00 | Tea Break |  |
| 11:00 – 1:00 | Session 5: Data Demand & Information Use (continued)   * **Decision-making** * **Operationalize use of your indicators** * **Decision Calendar / Data flow mapping** |  |
| 1:00- 2:00 | Lunch |  |
| 2:00- 3:30 | Data Demand & Information Use (continued)   * **Communicating M&E information** * **Data Use tools** * **Facilitating Data Use** |  |
| 3:30-3:45 | Tea Break |  |
| 3:45-5:00 | M&E Work Plan Development: Using Information   * **Catch Up** * **Incorporating Data Demand & Information Use** |  |
| 5:00–5:30 | Wrap Up & Day’s Evaluation   * **Q&A, Housekeeping** * **Evaluations** |  |

***There are no enemies in M&E!***

|  |  |  |
| --- | --- | --- |
| Time | Day 4 – February 8 | Facilitators |
| 9:00-9:30 | Overview of Previous Day and Today’s Agenda |  |
|  | * **Review evaluations** * **Participant report back** * **Overview of Day** |  |
| 9:30-10:30 | M&E Work Plan Development | **All** |
| 10:30- 10:45 | Tea Break |  |
| 10:45 – 1:00 | Data Quality   * **Data Quality: An Introduction** * **Data Quality Concepts** |  |
| 1:00-2:00 | Lunch |  |
| 2:00 – 3:30 | Data Quality (continued)   * **Data Quality Audits** * **Data Quality Management Plan** * **Experience with DQA** |  |
| 3:30 – 3:45 | Tea Break |  |
| 3:45 – 5:00 | M&E Work Plan Development: *Managing Data Quality* |  |
| 5:00–5:30 | M&E Workshop Wrap Up |  |
|  | * **Q&A, Housekeeping** * **Wrap Up: Public Health Questions, Keys to M&E** * **Posttest** * **The Way Forward** |  |

***“What you measure is what you get.”***

|  |  |  |
| --- | --- | --- |
| Time | Day 5 – February 9 | Facilitators |
| 9:00-9:30 | Overview of Previous Day and Today’s Agenda   * **Review evaluations** * **Participant report back** * **Overview of Day** |  |
| 9:30 – 10:30 | M&E Work Plan Development | All |
| 10:30- 10:45 | Tea Break |  |
| 10:45 – 12:00 | Engagement Strategies   * **Identifying and communicating with key program stakeholders** * **Success in implementing and sustaining your M&E efforts** |  |
| 12:00 – 1:00 | M&E Work Plan Development and Presentation Preparation | **All** |
| 1:00-2:00 | Lunch |  |
| 2:00 – 3:30 | M&E Work Plan Presentations | **All** |
| 3:30- 3:45 | Tea Break |  |
| 3:45 – 5:00 | M&E Capacity Building Workshop Close   * Wrap Up * Final Q&A’s * Posttests * Opportunities and the Way Forward | **All** |

***“The best time to plant a tree is 20 years ago; the next best time is now.”***

**WHY IS MONITORING & EVALUATION USEFUL?**

**1.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**3.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

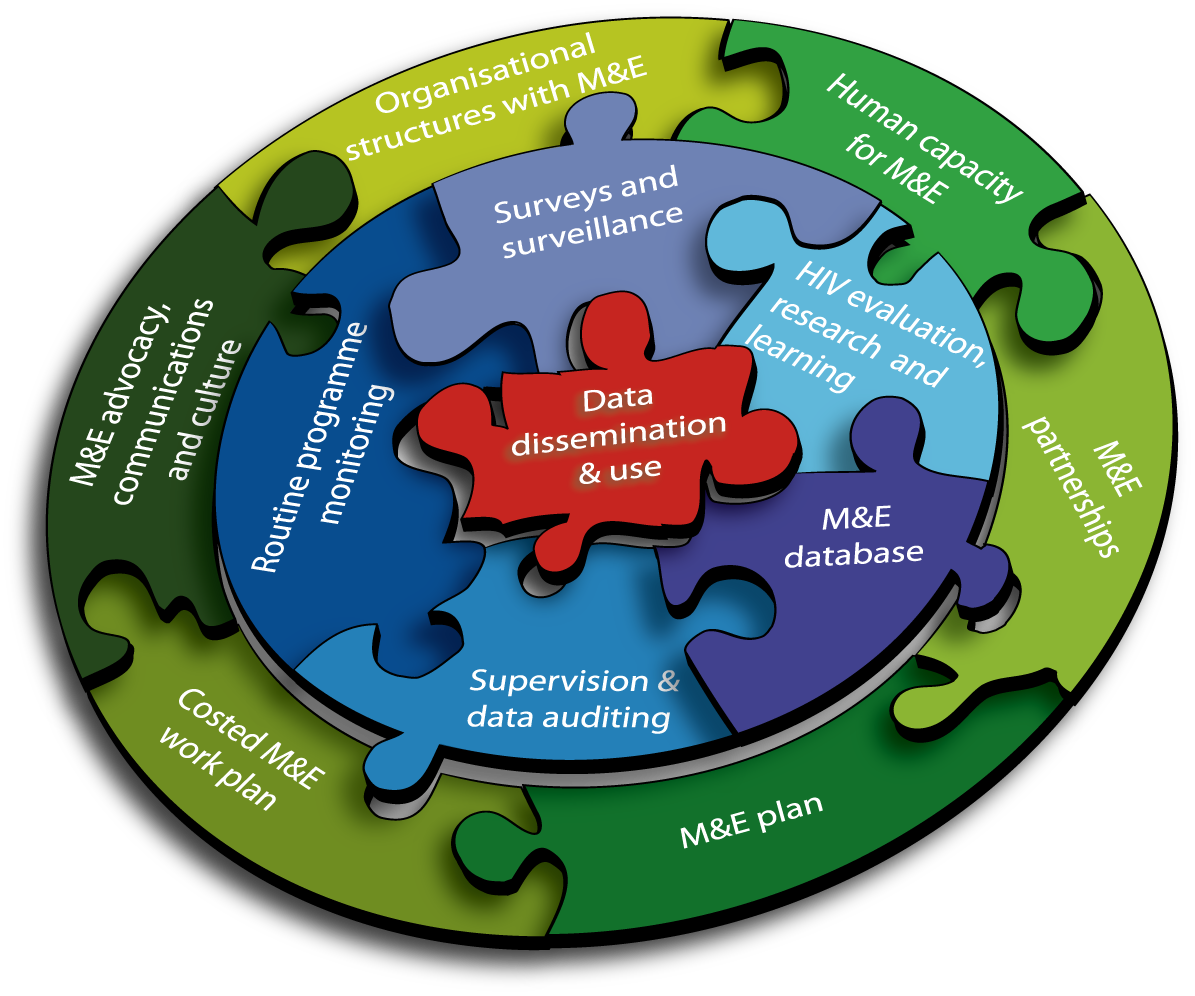
**4.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**5.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Monitoring & Evaluation Capacity SWOT Analysis

|  |  |
| --- | --- |
| **Strengths**  I NTERNAL | **Weaknesses**      INTERNAL |
| **Opportunities**  EXTERNAL | **Threats**  EXTERNAL |

# Organization Framework for a Functional HIV M&E System



**Monitoring & Evaluation Capacity Building Workshop**

[Date / Venue / Program]

###### Pre-training Evaluation Form

Please complete this brief training evaluation. This information will help us improve future M&E training and meet technical assistance needs more effectively. You do not have to put your name on this form, but if you feel comfortable, please indicate your role/position in the space below.

1. **Job Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Description** (A few words describing your job):

2. Please provide a self-assessment of your monitoring and evaluation experience using the following continuum. Circle the **number (1-4)** that best represents your evaluation experience:

|  |  |  |  |
| --- | --- | --- | --- |
| **1** | **2** | **3** | **4** |
| **I am new to**  **monitoring and evaluation.** | **I am not experienced**  **with monitoring and evaluation but I am familiar with the**  **concepts.** | **I have limited**  **monitoring and**  **evaluation experience.** | **I am experienced**  **with monitoring**  **and evaluation.** |

Please assess your skills in the following areas by marking an X for the answer that best describes your self assessment.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **I can…** | | | | | | |
|  | **Strongly Disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly Agree** |
| **3. List my organization’s Vision or Mission Statement, program goals & objectives.** |  |  |  |  |  |
| **4. Explain the difference between, and provide examples of monitoring & evaluation.** |  |  |  |  |  |
| **5. Define common M&E terms.** |  |  |  |  |  |

**---Over---**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **I can…** | | | | | |
|  | **Strongly Disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly Agree** |
| Develop a M&E results framework based on the activities from my organization. |  |  |  |  |  |
| Develop M&E program indicators. |  |  |  |  |  |
| Report on USG required indicators. |  |  |  |  |  |
| Identify ways to use M&E data for program planning, management, & improvement. |  |  |  |  |  |
| Recognize threats to data quality and I know how to manage them. |  |  |  |  |  |
| Engage key personnel in my organization on M&E practices / activities. |  |  |  |  |  |

***Thank you for your participation!***

Monitoring & Evaluation Capacity Building Workshop:

[Date / Venue / Program]

###### Post Training Evaluation Form

Please complete this brief training evaluation. This information will help us improve future M&E training and meet technical assistance needs more effectively. You do not have to put your name on this form, but if you feel comfortable, please indicate your role/position in the space below.

**1. Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2. Please provide a self-assessment of your monitoring and evaluation experience using the following continuum. Circle the number (1-4) that best represents your evaluation experience:**

|  |  |  |  |
| --- | --- | --- | --- |
| **1** | **2** | **3** | **4** |
| **I am new to**  **monitoring and evaluation.** | **I am not experienced**  **with monitoring and evaluation but I am familiar with the**  **concepts.** | **I have limited**  **monitoring and**  **evaluation experience.** | **I am experienced**  **with monitoring**  **and evaluation.** |

Please assess your skills in the following areas **AFTER** the workshop by marking an X for the answer that best describes your self assessment.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **I can…** | | | | | | |
|  | **Strongly Disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly Agree** |
| **3. List my organization’s Vision or Mission Statement, program goals & objectives.** |  |  |  |  |  |
| **4. Explain the difference between, and provide examples of monitoring & evaluation.** |  |  |  |  |  |
| **5. Define common M&E terms.** |  |  |  |  |  |

**---Over---**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **I can…** | | | | | |
|  | **Strongly Disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly Agree** |
| Develop a M&E results framework based on the activities from my organization. |  |  |  |  |  |
| Develop M&E program indicators. |  |  |  |  |  |
| Report on USG required indicators. |  |  |  |  |  |
| Identify ways to use M&E data for program planning, management, & improvement. |  |  |  |  |  |
| Recognize threats to data quality and I know how to manage them. |  |  |  |  |  |
| Engage key personnel in my organization on M&E practices / activities. |  |  |  |  |  |

Please indicate the extent to which you agree or disagree with the following statements.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Strongly Disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly Agree** |
| 1. **The workshop was well organized.** |  |  |  |  |  |
| 1. **The workshop topics were relevant to my needs.** |  |  |  |  |  |
| 1. **The instructors were well prepared.** |  |  |  |  |  |
| The instructors were receptive to participant comments and questions. |  |  |  |  |  |
| The small group work helped me learn the material. |  |  |  |  |  |
| The small group work helped me develop products for my project. |  |  |  |  |  |
| The workshop enhanced my skills to monitor and evaluate my project. |  |  |  |  |  |
| I expect to use the skills gained from this workshop. |  |  |  |  |  |
| I would recommend this workshop to a colleague. |  |  |  |  |  |

Lastly, please respond to the following items:

|  |
| --- |
| The most useful part of the workshop was/ what I liked about this workshop: |
|  |

|  |
| --- |
| Something I would change to make the workshop better would be: |
|  |
| 18. I would like to see future M&E training sessions that address: |
|  |

***Thank you for your participation!***

Monitoring & Evaluation Capacity Strengthening Workshop

[Date / Venue / Program]

Daily Monitoring Form

**Date: Day 1 Day 2 Day 3 Day 4**

**Name of Organization:**

1. How satisfied were you withthe **facilitation** of the workshoptoday?

Not satisfied at all **1 2 3 4 5** Very satisfied

Comments:

1. How satisfied were you with the **workshop content** fortoday?

Not satisfied at all **1 2 3 4 5** Very satisfied

Comments:

1. How satisfied were you with the workshop **materials** fortoday?

Not satisfied at all **1 2 3 4 5** Very satisfied

Comments:

1. Overall, how would you rate your **learning** **experience** today?

Excellent

Very good

Good

Fair

Poor

1. Which **activities** helped you learn the most?

1. Was there anything you did **not understand** in today’s sessions?

1. Please describe something new/important that you **learnt** today and how you will use this knowledge in your organization?

1. Is there any **area** you would like us to provide you with further assistance after the workshop?

# Session 2: Monitoring & Evaluation Capacity Strengthening Overview

# M&E Definitions Worksheet

###### Instructions

Please read the following intervention description. Answer each question below by writing down the type of M&E activity that is being conducted.

###### The Intervention

YouthAID CBO is conducting a group-level intervention that intends to reach high-risk, out-of-school adolescent youth. The CBO plans to provide three, one-hour sessions to cover basic information about HIV transmission and to teach condom use skills. The intended outcome is to increase HIV knowledge and condom use. The CBO plans to use the Healthy Youth Curriculum to facilitate these sessions. It is estimated that this intervention will target 100 adolescents per quarter.

The Questions

1. Students in the YouthAID program are asked to complete the Youth Risk Behavior Survey administered nationally and annually as a way of tracking their and other youths’ behaviors. What type of M&E activity is being conducted?
2. The YouthAID program manager sits in to observe the intervention and to see if the health educator is following the Healthy Youth Curriculum and also asks participants how satisfied they were with the sessions once they are completed. What type of M&E activity is being conducted?

1. The Ministry of Health and other partners review HIV/AIDS surveillance data for the past three years since the program started to determine the HIV risk situation of youth in the country. What type of M&E activity are they conducting?
2. A sample of participants in the YouthAID program are given HIV tests at the beginning of the program and are tested repeatedly over a five-year period to learn if they have seroconverted. These seroconversion rates are compared with those of youth who are not involved with the program. What type of M&E activity is being conducted?
3. YouthAID staff administer a behavioral questionnaire to participants before the intervention and 3 months after the intervention. Staff give the same questionnaire in the same time periods to a similar group of youth who did not receive the intervention. The results of these surveys are compared to see if there were changes in behavior and if the two groups differed. What type of M&E activity is being conducted?
4. YouthAID staff keep a record of the number of youth who attend each session as well as participants’ gender and age. Staff also keep a record of the numbers and types of educational materials distributed to these participants. What type of M&E activity is being conducted?
5. YouthAID staff conduct a needs assessment to learn more about the factors that put their population at risk for HIV. They use this information to plan their intervention with this population. What type of M&E activity are they conducting?
6. YouthAID staff conduct a client focus group, but once the group is complete, no one ever transcribes the audiotapes of the group discussion or looks at the information that emerged from this discussion. The tapes sit in a box in the back office. What type of M&E activity are they conducting?

# M&E Definitions Answer Sheet (For Training Facilitators)

###### Instructions

Please read the following intervention description. Answer each question below by writing down the type of M&E activity that is being conducted.

###### The Intervention

YouthAID CBO is conducting a group-level intervention that intends to reach high-risk, out-of-school adolescent youth. The CBO plans to provide three, one-hour sessions to cover basic information about HIV transmission and to teach condom use skills. The intended outcome is to increase HIV knowledge and condom use. The CBO plans to use the Healthy Youth Curriculum to facilitate these sessions. It is estimated that this intervention will target 100 adolescents per quarter.

The Questions

1. Students in the YouthAID program are asked to complete the Youth Risk Behavior Survey administered nationally and annually as a way of tracking their and other youths’ behaviors. What type of M&E activity is being conducted? **Outcome monitoring**
2. The YouthAID program manager sits in to observe the intervention and to see if the health educator is following the Healthy Youth Curriculum and also asks participants how satisfied they were with the sessions once they are completed. What type of M&E activity is being conducted? **Process evaluation**
3. The Ministry of Health and other partners review HIV/AIDS surveillance data for the past three years since the program started to determine the HIV risk situation of youth in the country. What type of M&E activity are they conducting? **Impact monitoring**
4. A sample of participants in the YouthAID program are given HIV tests at the beginning of the program and are tested repeatedly over a five-year period to learn if they have seroconverted. These seroconversion rates are compared with those of youth who are not involved with the program. What type of M&E activity is being conducted? **Impact evaluation**
5. YouthAID staff administer a behavioral questionnaire to participants before the intervention and 3 months after the intervention. Staff give the same questionnaire in the same time periods to a similar group of youth who did not receive the intervention. The results of these surveys are compared to see if there were changes in behavior and if the two groups differed. What type of M&E activity is being conducted? **Outcome evaluation**
6. YouthAID staff keep a record of the number of youth who attend each session as well as participants’ gender and age. Staff also keep a record of the numbers and types of educational materials distributed to these participants. What type of M&E activity is being conducted? **Input/output monitoring**
7. YouthAID staff conduct a needs assessment to learn more about the factors that put their population at risk for HIV. They use this information to plan their intervention with this population. What type of M&E activity are they conducting? **Assessment and Planning**
8. YouthAID staff conduct a client focus group, but once the group is complete, no one ever transcribes the audiotapes of the group discussion or looks at the information that emerged from this discussion. The tapes sit in a box in the back office. What type of M&E activity are they conducting? **No evaluation—data are not being used**

# Session 3: Developing Your Monitoring & Evaluation Work Plan

HINTS FOR WRITING QUALITY GOALS

Developed by PACT SA

Remember goals…

* Present the desired outcomes, accomplishments, result or purpose sought (not the process!)
* Capturebroad changes in conditions, answering the “so what” question (So… we trained 100 people and increased their knowledge but did or did they not change their behavior?).
* Often goals that reflect behavior, attitude or economic change and show how our activities contribute toward a larger development impact.
* Usually reflect a result achieved an intermediate time period (2-5 years).

To write a goal mentally picture what you want and say:

(I want) TO of/among

(action verb) (what) (whom)

(Often *what behavior/practice change ,   
 attitude or economic change sought*)

or

(Though sometimes just the knowledge,  
 capacity or access change sought)

Goals should usually not be a restatement of the development impact.

|  |  |
| --- | --- |
| NO!! | YES!! |
| To improve health | To improve the health practices of people living in targeted pastoralist communities |
| To reduce conflict | To increase the effective management of critical conflicts among local communities. |
| To increase standards of living | To increase the price of livestock sold on the local market. |
| To reduce incidence of HIV/AIDS | To reduce the number of sexual partners among men 15-49. |

HINTS FOR WRITING QUALITY OBJECTIVES

Remember objectives…

* Are linked directly to the goals and state the outputs--information, products, processes, services or results you hope to produce that will support attainment of the goal.
* Reflect what you hope to produce by undertaking a specific activity. For example: You decide you want to train people (the activity) then and objective will relate to the knowledge you have increased.
* Usually reflect a result achieved in a relatively short-time period (0-2 years).
* Objectives are SMART:
* •**S**pecific: The objective states a specific output to be accomplished. The output is stated in numbers, percentages, frequency, reach, scientific outcome, etc. The object is defined.
* •**M**easurable: The objective can be measured and the measurement source is identified.
* •**A**chievable: The objective or expectation of what will be accomplished is realistic given the time period, working conditions, resources etc.
* •**R**elevant: The output of the objective supports the goals sought in the project.
* •**T**ime-bound: Clearly states when the objective will be accomplished.

To write an objective:

(I want) TO the in by as measured by by

(direction of change) (what will be changed)(target of change) (results to be achieved) (how measured) (time frame)

Example:

To increase the number of children in primary school in the greater Nairobi area by 25% (as measured by school records) by December 30, 2005.

OR

TO to by as measured by .

(Action taken) (object of action) (to whom/ reciepient) (by when) (how measured)

Example To provide 4 workshops on peace building methods to 100 community members by December 30, 2005 as measured by field staff workshop reports.

**HINTS FOR SELECTING QUALITY INDICATORS**

Remember indicators ….:

•Identify what will be measured to know if conditions have or have not changed.

•Provide evidence as to the achievement of (or lack of) results and activities

•Can be quantitative (number related) measures or qualitative (narrative related) observations

•Indicators are indicative (not just general management info)– it enables you to reduce a large amount of data down to its simplest form an indicator of organizational capacity might be resources mobilized versus number of computers.

Steps in indicator selection:

1) Identify what needs to be measured (look at goals and objectives).

2) Develop a list of possible indicators (brainstorm, check with experts, other organizations, beneficiaries, partners…)

3) Assess indicators by the ten criteria

4) At a minimum identify the data source (where you will get the data) and the frequency with which the data will be collected (data protocols).

Criteria: Ten Criteria for Assessing Indicators

1) **Measurable** (can be quantified and measured by some scale). Quantitative indicators are numerical. Qualitative indicators are descriptive observations. While quantitative indicators are not necessarily more objective, their numerical precision lends them to more agreement on interpretation of results data and are thus usually preferable. However, even when effective quantitative indicators are being used, qualitative indicators can supplement them to provide a richness of information that brings a program’s results to life.

2) **Practical** (data can be collected on a timely basis and at reasonable cost). Managers require data that can be collected frequently enough to inform them of progress and influence decisions. Organizations should expect to incur reasonable but not exorbitant cost for obtaining useful information. A rule of thumb is to plan on allocating 3 to 10 percent of total program resources for monitoring and evaluation.

3) **Reliable** (can be measured repeatedly with precision by different people). The data that a program manager needs to make reasonably confident decisions about a program is not necessarily the same rigorous standard a scientist is looking for, but all indicators should be able to be measured repeatedly with relative precision by different people.

4) **Relevant--Attributable to the GRANTEE** (the extent to which a result is caused by grant sponsored activities). Attribution exists when the links between the outputs produced by grant financed activities and the results being measured are clear and significant.

5) **Management Useful** (information provided by the measure is critical to decision-making). Avoid collecting and reporting information that is not used to support program management decisions.

6**) Direct** (the indicator closely tracks the result it is intended to measure). An indicator should measure as closely as possible the result it is intended to measure. For example, Contraceptives prevalence rate is a direct measure of the result increased use of family planning methods. But number of services providers trained would not be a direct measure of the result improved service delivery. Just because people are trained does not necessarily mean they will deliver service better.

If using a direct measure is not possible, one or more proxy indicators might be appropriate. For example, sometimes reliable data on direct measures are not available at a frequency that is useful. Proxy measures are indirect measures that are linked to the result by one or more assumptions. In rural regions, for example, it is often very difficult to measure income levels directly. Measures such as percentage of village households with roofs (or radios or bicycles) may be a useful, if somewhat a rough proxy. The assumption is that when villagers have higher income they tend to purchase certain goods. If convincing evidence exits that the assumption is sound (for instance, it is based on research or experience elsewhere), then the proxy may be an adequate indicator, albeit second-best to a direct measure

7) **Sensitive** (serves as an early warning of changing conditions). A sensitive indicator will change proportionately and in the same direction as changes in the condition or item being measured, thus sensitive proxy indicators can be used as an indication (or warning) of results to come. For example, household rice consumption is a sensitive proxy indicator for income if the amount of rice consumed ALWAYS rises with the level of Income.

8) **Responsive** (can be changed by management control). Indicators should reflect change as a result of project activities and thus indicators reflect results that are responsive to management control.

9) **Objective** (the measure is operational precise and uni-dimensional). An objective indicator has no ambiguity about what is being measured. That is, there is a general agreement over interpretation of the results. It is both uni-dimensional and operationally precise. To be unidimensional means that it measures only one phenomenon at a time. Avoid trying to combine too much in one indicator. For example, while number of successful export firms is ambiguous, something like the number of export firms experiencing an annual increase in revenue of at least 5 percent is operationally precise.

10) **Capable of being Disaggregated** (data can be broken down by gender, age, location, or other dimension where appropriate). Disaggregating data by gender, age, location or some other dimension is often important from a management or reporting point of view. Experience shows that development activities often require different approaches for different groups and affect those groups in different ways. Disaggregated data help track whether or not specific groups participate in and benefit from activities intended to include them. Therefore, it makes good management sense that indicators be sensitive to such differences.

# Session 4: Frameworks

# Developing Frameworks from Program Design

**Program Strategy**

***Outlining a program strategy is the first step towards building and strengthening a monitoring and evaluation information system!***

**Goal:** *What is the goal of your project? This is the main goal that drives all of the activities and related sub-activities.*

**Objective:** *What are the specific objectives that you have outlined as steps in order for you to take to accomplish your desired goal?*

**Activities:** *The activities are what you to do carry out your objectives.*

**Sub-Activities:** *Sometimes there are “sub” objectives that must be accomplished in order to achieve your main objectives. If your main objective is, for example, to build the capacity of health care workers to provide ART treatment, developing an ART treatment training curriculum may be a “sub” objective or activity that would need to be planned for as part of your main activity.*

# 2. Logical Framework

**Goal:** Whatis the intended goal of the activity or project?

**Objective:** What are the planned objectives designed to achieve your desired goal?

**Begin by inserting your activities** HERE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Input** | **Activity** | **Output** | **Outcomes** | **Impact** |
| Quantifiable resources going in to your activities – the things you budget for. | 1. What you do to accomplish your objectives?   2) What else do you do to accomplish these objectives? Are there any sub-objectives that should be measured?  Each activity should have its own set of inputs and outputs. | Immediate results from your activity  - people trained, services provided | Longer-term expected results related to changes in knowledge, attitude, behaviour, etc.  Related to program Goal | Long-term, population level result. Can relate to a program or organization vision / mission statement |

# 

# 3. Indicators

*Indicators are how we measure progress towards a specific objective or goal. After you’ve laid out the various levels (input, output, outcome, impact) of your activity, you can then begin to decide how to measure progress towards achieving your objectives and goals by selecting appropriate indicators.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Input** | **Activity** | **Output** | **Outcomes** | **Impact** |
| **Level** | Quantifiable resources going in to your activities – the things you budget for. | 1) What you do to accomplish your objectives? | Immediate results from your activity  - people trained, services provided | Longer-term change in knowledge, attitude, behaviour, etc.  Related to program Goal | Long-term, population level change. Can relate to a program or organizations vision / mission statement |
| **Indicator**  **(***example***)** | *- # of manuals printed for training*  *- money spent on training implementation* | **Training** | *# of people trained*  *# of trainings conducted* | *Measure of change in quality of care provided to clients* | *HIV incidence in target population* |

**Program Strategy – *Fill in you own!***

***Outlining a program strategy is the first step towards building and strengthening a monitoring and evaluation information system!***

|  |  |
| --- | --- |
| ***Vision:*** |  |
| ***Mission:*** |  |
| ***Goal:*** |  |
| ***Objectives:*** |  |
| ***Key Activities:*** |  |

**Program Context:** *(List any additional information that will provide valuable information for program planning and implementation: target population, service areas, etc.)*

# Logical Framework

**Goal:**

**Objective:**

**Begin by inserting your activities** HERE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Input** | **Activity** | **Output** | **Outcomes** | **Impact** |
|  |  |  |  |  |

# Session 5: Measuring for Success: Developing Program Indicators

# Indicators

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Input** | **Activity** | **Output** | **Outcomes** | **Impact** |
| **Level** |  |  |  |  |  |
| **Indicator** |  |  |  |  |  |

*Indicators are how we measure progress towards a specific objective or goal. After you’ve laid out the various levels (input, output, outcome, impact) of your activity, you can then begin to decide how to measure progress towards achieving your objectives and goals by selecting appropriate indicators.*

# Session 6: Information Use

**MEASURE Evaluation**

**Decision Calendar**

**Guideline and Instructions**

**Purpose**: the Decision Calendar has two specific purposes:

1. As a management tool to be used by program managers and directors in facilitating the use of information in decision making. This is a working document that should be extended and revised as a program develops or changes
2. As a monitoring tool for identifying instances of data use by program managers, donors and external consultants.

**Process**:

*Management:* The drafting of the DDU Calendar can be facilitated by an external consultant or program manager. The materials needed in order to successfully draft this document may include a strategic plan for the targeted program or organization, a monitoring and evaluation plan or results framework for the targeted program or organization, and an monitoring and evaluation operational plan. In some cases all of these documents will be available, in other cases, there will be no documentation available to support this drafting and interviews with various stakeholders will have to suffice. In the case where a Capacity Development Consultation was conducted, the facilitator should review the report for notes regarding the decisions that need to be made and constraints and issues surrounding using information to make decisions. In the case where a Rapid Assessment for the Constraints to Data Use was conducted, the facilitator should review the report in order to understand challenges and gaps in using information to make decisions.

Once with the appropriate stakeholders, the facilitator should explain the three areas of decisions and issues (defined below) and begin a conversation with the stakeholders regarding the decisions that need to be made during a specific timeframe. For example, the National AIDS Program has just initiated a multi-sectoral HIV/AIDS program and has major decisions to make about program design, management and the drafting of policy. The facilitator should work through these three areas with the stakeholders through brainstorming and discussion. It is possible that within these conversations various issues and areas for follow-up with be identified. It is important to document items for follow-up.

*Monitoring*: With support from external technical assistance, this tool can easily be used to review identified decisions and determine if and how information was used by the stakeholders in discussing the decision at hand. In order to verify instances of data use, it is important to collect supporting documentation such as meeting agendas, emails or PowerPoint presentations that make mention of the data intended to inform the process around making a specific decision.

**Definitions**:

There are three areas of decisions or issues. It is important to remember that although these areas are described separately in the calendar they are very interrelated and at times can overlap. These include the following:

* Policy and Advocacy
* Program Design and Improvement
* Program Management and Operations

*Policy and Advocacy*: Considering that policy and advocacy decisions and issues typically require a specific process for formalization and approval they are included in this calendar as a separate area.

Examples:

* HIV/AIDS Workplace Policy
* Family Planning Counseling Protocol
* National allocation of funds to a Health Information Unit
* HIV/AIDS National Strategy Document

*Program Design and Improvement*: Depending on the scope and timeline of the program there could be a wide range of program specific decisions that need to be made beginning with program design and improvement, scale-up, sustainability, and possibly close out. The section of this calendar is especially flexible and should be visited frequently by stakeholders involved in the design and success of the program. A variety of data and stakeholders will be involved in this aspect of the calendar.

Examples

* Design of Prevention of Mother Transmission of HIV/AIDS program
* Procurement of drugs and commodities
* Improving performance of family planning counselors

*Note*: Within the context of program design and management there may be various program areas. For example, within a Multisectoral Approach to HIV/AIDS Program areas will include: Voluntary Counseling and Testing, Behavioral Change and Communication, Prevention of Mother to Child Transmission of HIV/AIDS, and HIV/AIDS in the Workplace. It may be helpful to include an additional column in this table that identifies the program area and the lead stakeholder may vary depending on the program area. This section of the DDU calendar will need to be updated often.

*Program Management and Operations*: Aside from decisions that directly influence the content and success of a program, there are operational and management decisions that will affect its success. These include administrative and financial decisions that a program manager must make in order to support an ongoing program. Administrative and financial data should be used to support these decisions.

Examples:

* Number of staff to support program monitoring
* Reporting mechanisms
* Allocation of national program funds to districts or local implementers

*Note*: It may be difficult at times to differentiate program design and improvement decisions from program management and operations decisions. For example, decisions based on the cost effectiveness of a specific program- may be included in either area as stakeholders will need to draw upon both financial and program related data.

Types of decisions also vary according to frequency. These groups include **routine** and **non-routine**. The frequency of decisions reflect and affect who is involved in the decision making process and how the information is collected.

* *Routine decisions* are those made on a daily, weekly, monthly, quarterly or annual basis. For example:
  + Allocation of funds to national hospital (annual).
  + Determining the number family planning counselors to be trained and decide to which health clinics they will be deployed (annual).
  + Allocation of anti-retroviral drugs to regional drug stores (quarterly).
* *Non-routine decisions* are those which are considered to be sporadic and considered as any decision that is not reoccurring. For example
  + Determining functions and authority by type of provider for administering anti-retroviral drugs (to be included in National HIV/AIDS Care and Treatment Protocol).
  + Developing key public service announcement messages for male involvement strategy to reduce partner disapproval of FP.
  + Identification for disbursement of donated family planning commodities to VCT sites.

Policy and advocacy, program design and improvement, and program management and operations decisions may all include routine and non-routine decisions.

**Data Demand and Use Calendar**

**Template**

PROGRAM:

PROGRAM MANAGER:

FACILITATOR:

TIME PERIOD:

STAKEHOLDER GROUPS:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **POLICY & ADVOCACY DECISIONS AND ISSUES** | | | | | |
| **DECISION** | **FREQUENCY** **[[1]](#footnote-1)** | **STAKEHOLDERS****[[2]](#footnote-2)** | **REQUIRED INFORMATION****[[3]](#footnote-3)** | **NEXT STEPS** | **TIMELINE** |
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| **PROGRAM IMPROVEMENT & DESIGN DECISIONS/ISSUES** | | | | | |
| **DECISION** | **FREQUENCY** | **STAKEHOLDERS2** | **REQUIRED INFORMATION3** | **NEXT STEPS** | **TIMELINE** |
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| **PROGRAM MANAGEMENT & OPERATIONS DECISIONS/ISSUES** | | | | | |
| **DECISION** | **FREQUENCY** | **STAKEHOLDERS2** | **REQUIRED INFORMATION3** | **NEXT STEPS** | **TIMELINE** |
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Utilization Plan for:

Date:

Goal:

Objective:

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| --- | --- | --- | --- | --- | --- |
| Indicator | Use | Stakeholders | Mechanism | Format | Next Steps |
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| Indicator | Use | Stakeholders | Mechanism | Format | Next Steps |
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**Monitoring and Evaluation Work Plan**

**Activity Results and Dissemination Plan Exercise**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Activity: | Input | | Output | | Outcome | | Impact | |
|  | |  | |  | |  | |
| Period: | | Period: | | Period: | | Period: | |
| Expected | Actual | Expected | Actual | Expected | Actual | Expected | Actual |
|  |  |  |  |  |  |  |  |
| **Program Notes:** | | | | | | | | |
| **Implications for Program:** | | | | | | | | |
| **Implications for Community:** | | | | | | | | |
| **Key Recommendations for Program Staff:** | | | | | | | | |
| **Recommendations for Stakeholders:** | | | | | | | | |

Audience Analysis

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Audience** | **Audience Background (Knowledge, Experience, etc.)** | **Audience Demographic Characteristics** | **WHAT information is required (audience needs and interests)** | **WHY is the Information required** | **WHEN is the Information required** | **HOW Information will be Communicated (Format)** |
| External Audience | | | | | | |
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| Internal Audience | | | | | | |
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# Session 7: Data Quality

**5 Criterion of Data Quality**

**Validity:** Do the data adequately represent performance   
& are thus valid.

Example: Does no. of visits reflect actual visits?

Are OVC really OVC as defined?

Are data collection tools & procedures well understood?

Are data entry and collation procedures sound? Is the data tallied correctly?

Improving Validity

* Routinely randomly check data for transcription errors.
* Track errors to their original source and correct mistakes.
* Always double check that final numbers are accurate!

**Reliability:** Are data collection processes stable & consistent over time and are thus reliable?

Consistency:

* Consistent data collection processes are used from month to month, location to location, data source to data source.
* The same instrument is used to collect data from month to month, location to location.

Transparency:

* Data collection, reporting, & quality assessment procedures are documented in writing.
* Data problems at each level are reported to the next level.
* Data quality problems are clearly described in reports.

Improving Reliability

* Understand instructions/definitions for all data collection efforts.
* Document data collection and reporting procedures at your site.
* Make sure everyone is aware of the procedures and follow your procedures from reporting period to reporting period!
* Maintain official records with copies.
* Provide guidance to data collectors on what to do if the see a data error and who to report it to.
* Document and report on errors.
* Give feedback to data collectors and source of data to motivate them.

**Integrity:** Are data free of ‘untruths’ (introduced by either human or technical means, willfully or unconsciously) and therefore have integrity?

Manipulation / Bias

* Mechanisms are in place to reduce the possibility that data are manipulated for political or personal reasons.
* There is objectivity and independence in key data collection.
* There has been independent review.
* Credibility of the data from a secondary source
* Handle the data together, as an entire team, for reporting purposes
* Have routine methods for randomly checking the accuracy of the data.
* Eliminate any incentives that may affect data truthfulness

**Precision:** Do the data have minimal error and are thus precise?

* Error is crucial given the management decisions to be affected. (consider the consequences of the program or policy decisions based on the data)
* Possible error has been reported along with the data.

Improving Precision

* Report any issues around precision
* Document any errors
* Train staff, delegate specific duties with timelines.

**Timeliness:** Are data collected frequently enough to be relevant   
and thus timely?

Frequency

* Data are available on a frequent enough basis to inform program management decisions.
* A schedule of data collection, collation and reporting is in place that meets program management and reporting needs.

Currency

* The data are reported in the most current timeframe practically available
* The data are from within the policy period of interest
* The data are reported as soon as possible after collection
* The date of collection is clearly identified in reports

Improving Timeliness

* Make a schedule and keep to it!
* Expect/include time in data collection efforts for a large number of call-backs.
* Clarify dates of data collection periods when presenting results.
* Clarify needs of MER audiences and meet those timelines
* Have a calendar for when data is due at each level in the data management process

**Identifying and Managing Threats to Data Quality**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Indicator** | **Source** | **Possible Data Quality Issues** | **Type of Issue**  **(VRIPT\*)** | **Strategy to Address Issue** |
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**\*Validity, Reliability, Integrity, Precision, Timeliness**

**Data Quality Management Template**

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| --- | --- | --- |
| **Name of Indicator** | **Data Quality Issues** | **Actions Taken or Planned to Address this Limitation** |
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# Session 8: Engagement Strategies

***Remember egagement is not just something that is done; it is a WAY of doing things. Here are some Tools for Engagement:***

Stakeholder Assessment

Purpose

The purpose of this tool is to help you identify stakeholders and their interest in the organization. It can be used to analyze organizational relevance and assess the environment.

Instructions

1. Fill in the names of your stake holders in the first column
2. Identify each stake holder’s category. These might be funders, employees, senior leadership, or the organization’s partners. You should customize your categories to suit your organization’s identified stakeholders. You might also indicate whether a stakeholder

A. Is an integral part of the organization;

B. Is interested in, and committed to, the organization;

C. Knows the organization but is not committed to it; or

D. Has a vested interest in destroying the organization, that is, competitors, etc.

1. Indicate each stake holder’s interest in the M&E results, that is, whether a stakeholder

A. Will use the results for planning;

B. Will use them to support the organization; or

C. Will use the M&E results to design new programs, introduce change, or develop future strategies, etc.

Each stake holder may have several interests.

1. Identify each stake holder’s possible participation or role in the M&E implementation, that is, whether the stake holder can

A. Be a data or information provider;

B. Make decisions based on M&E findings; or

C. Become a beneficiary of change arising from the M&E findings, etc.

Each stake holder may have several roles in the implementation process. One person can be listed more than once.

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder | Category | Interests | Participation or Role |
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Adapted from: Enhancing Organizational Performance: A Toolbox For Self-Assessment. *Charles Lusthaus, Marie-Hélène Adrien, Gary Anderson, And Fred Carden* Internaltional Research Development Centre, 1999.

**MY M&E Role**

**Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Position:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monitoring and Evaluation is most effective in an organization when it is comprehensive and well-integrated; each person must understand their own role in M&E. There are no enemies in M&E! The purpose of this guide is for the individual to understand their own information use needs and their own M&E role.

*This is filled out by EVERYONE in an organization!*

**What are the decisions that I make?**

**What information do I need to make this decision (required information)?**

**(Where does this information come from? Going?)**

**When do I need this information? (frequency: briefly explain, monthly, quarterly, every time I….)**

**Who needs this information (stakeholders)?**

**What will I do with this information (next steps)?**

**When will I do something with this information (timeline)?**

**Information for Decision-Making Template**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Decisions I have to make to do my job? To work smarter and not harder! More effectively and more efficiently?*** | | | | | |
| **DECISIONS** | **REQUIRED INFORMATION1** | **FREQUENCY2** | **STAKEHOLDERS3** | **NEXT STEPS** | **TIMELINE** |
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1. “Required Information” should include the data source, status of this data source and quality of the data available.

2. “Frequency” includes whether this decision is routine or non-routine. If the decision is routine, the exactly frequency should be included (daily, weekly, monthly, quarterly or annually).

3. “Stakeholders” include those involved in making the decision. All individuals or groups should be listed. A lead stakeholder should be identified. This is the person who will initiate the meeting, agenda item or conversation with the appropriate group regarding this decision or issue. An additional column should be added to this table if needed.

**Data Use Barriers and Facilitating Factors:**

What information do you currently use to make decisions?

Are there currently any barriers to obtaining the information you need to make decisions?

Plan to address M&E / Information Use Barriers:

**Monitoring and Evaluation**

**In Your Own Language**

***“If you talk to a man in a language he understands, that goes to his head. If you talk to him in his own language that goes to his heart.”***

**- Former South African President Nelson Mandela**

|  |  |  |
| --- | --- | --- |
| English | Local Language | Additional Language |
| ***Monitoring and Evaluation is:*** |  |  |
| Working smarter, not harder. |  |  |
| Learning from and improving what we do. |  |  |
| Time saving, not time-consuming |  |  |
| M&E is for everyone. |  |  |
| M&E must be well-integrated in order to be successful. |  |  |
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| **Proverbs:** |  |  |
| The best time to plant a tree is twenty years ago; the next best time is now. |  |  |
| A bird is in the air, but its mind is on the ground. |  |  |
| When spider webs unite, they can tie up a lion. |  |  |
| Everyone stream has its source. |  |  |
| Smooth seas do not make skillful sailors. |  |  |
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|  |  |  |
| **Notable Quotes:** |  |  |
| There are no enemies, in M&E. |  |  |
| Data Quality IS normal business practice. |  |  |
| Not everything that counts can be counted and not everything that can be counted, counts. |  |  |
| What you measure is what you get. |  |  |
| If you don’t know where you are going, how are you going to know when you get there? |  |  |
|  |  |  |
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**M&E WHY ME?**

***Data Collector Theme Song***

***Facilitator – Participant call and response***

How will you know? *How will I know?*

***What we’ve done?***

How will you know? *How will I know?*

***How well we’ve done?***

How will you know? *How will I know?*

***How much we’ve done?***

How will you know? *How will I know?*

***How far we’ve come?***

***How will we know?***

***How will we know?***

We monitor and evaluate

We collect and count and aggregate

This is how we learn

It’s how we’ll know

Using information

It’s how we’ll grow.

Now you know. *Now I know*

***What we’ve done.***

Now you’ve learned. *Now we’ve learned*

***How well we’ve done.***

Now you know. *Now we know*

***How far we’ve come.***

Now we can. *Now we can.*

***Improve and grow***

LEAD

*PARTICIPANTS*

***ALL***

*Add, adapt, make it your own.*

1. “Frequency” includes whether this decision is routine or non-routine. If the decision is routine, the exactly frequency should be included (daily, weekly, monthly, quarterly or annually). [↑](#footnote-ref-1)
2. “Stakeholders” include those involved in making the decision. All individuals or groups should be listed. A lead stakeholder should be identified. This is the person who will initiate the meeting, agenda item or conversation with the appropriate group regarding this decision or issue. An additional column should be added to this table if needed. [↑](#footnote-ref-2)
3. “Required Information” should include the data source, status of this data source and quality of the data available. [↑](#footnote-ref-3)