Monitoring & Evaluation Plan

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Definition

A M&E Plan is a document that describes a system which links strategic information obtained from various data collection systems to decisions that will improve programs.

or

A M & E plan is a document that helps to track and assess the results of the interventions throughout the life of a program,

or

A M & E plan is a guide that explains the goals and objectives of an M&E strategy and its key elements.

Rational

- An M&E plan helps to define, implement, track and improve a M & E strategy within a particular project or a group of projects;

- M&E plan is like a roadmap that describes how you will monitor and evaluate your program, as well as how you intend to use evaluation results for project improvement and decision making.

- it includes all the steps, elements and activities that need to happen from the project planning phase until the project reaches its goal and creates the intended impact.

Functions of M & E

- State how the program is going to measure what it has achieved (ensure accountability)
- Document consensus (encourage transparency and responsibility)
- Guide M&E implementation (standardization and coordination)
- Preserve institutional memory

M&E plan is a living document and needs to be adjusted when a program is modified.

Elements of M & E Plan

- Project Outcomes
- Relevant M&E questions to ask at different stages of the project life cycle
- Define Indicators
- Identify data sources and select collection methods
- Consider timing of data collection
- Assign responsibility for data collection
- Identify data collection, usage, storage and analysis
- Putt it all together
- Defining how M&E findings would be reported to donors, stakeholders and internal staff members to ensure project improvement, transparency and data-driven decision making
- Other required resources and capacities

Steps in designing an M & E Plan

- Identifying the focal problem and the need for a project
- Planning the project
  - Identify the goal, objectives and inputs/activities
  - The Key players
  - M & E questions
  - Roles and Responsibilities
- Defining a monitoring and evaluation framework - understand the scope of the project and choose one that best fits the purpose. Three types of M&E frameworks
  - Theory of Change which shows a bigger picture of all the underlying processes and possible pathways leading to long term behavioural changes
  - Logical Framework (LogFrame)/Logic Model – which ffocuses only on one specific pathway that a project deals with and creates a neat and orderly structure
  - A results framework which emphasises on results to provide clarity around the key project objectives

Cont…

- Identifying relevant indicators used to track the progress towards achieving the goals.
- Resolve implementation issues:
  - After creating monitoring indicators, Identifying data collection tools and methodologies. identify and collect relevant data to demonstrate the actual results of the project interventions against our indicators.
  - Before collecting data its good to discuss with the team: type of data to be collected (qualitative, quantitative or both), baseline data, relevant methods & tools, how & when will data be analysed, who is responsible.
  - Examples of data collection tools: Case studies, Recorded observations and Diaries
  - Methodologies: One-on-one interviews , Focus groups, surveys, document reviews & observation
- Identify Internal and External M & E resource Capacity (financial & human)

The golden rule to follow here is to collect fewer useful data properly than a lot of data poorly.

- Develop the M&E Work Plan matrix
- Report the results, disseminate ad use evaluation findings

- Develop the M & E plan which is designed around each goal or objective

Monitoring and Evaluation plan						
Activities /Resources	Key Outputs	Key outcomes	Key Outcome indicators	Sources of data and collection methods	Frequency of data collection and reporting	Responsible person(s) in capturing data

Monitoring and Evaluation Plan

Areas of focus for planning

<table>
<tr>
<th>indicator</th>
<th>Source of information (Means of Verification</th>
<th>Baseline at project outset</th>
<th>Data gathering methods:
a) Expertise needed
b) Responsibility</th>
<th>Data use:
a)Collation
b) Analysis
c) Feedback
d) Process review
e) Responsibility</th>
<th>Costs
Frequency and Timeframe</th>
</tr>
<tr>
<td rowspan="2">List the indicators you have chosen for each objective – output, outcome, goal – as specified in your project plan</td>
<td rowspan="2">This is where you will find the data for your indicators e.g.: a course register, an interview, a survey, an audit.
Choose appropriate sources, bearing in mind issues such as reliability, data quality, resource entailed.</td>
<td rowspan="2">Record for the indicator before the project began.
Your baseline does not change as the project progresses; it is the means by which you can show the difference that your project has made.
At the end of the project, you can compare your results to the baseline to see how far you have moved.
Ideally, use the same source of information that you will use to measure later in the project; if you are setting up measurement systems yourself, you may not have any baseline data, in which case use your needs assessment as a baseline (see examples below)</td>
<td colspan="3">This section will help you check whether your M&E plan is realistic.

<u>Reporting and data use</u>
Donor reports will have a defined structure but consider also how you can use your results to inform other stakeholders and how best to do this e.g. a meeting with project coordinators; or case stories. For more on communicating results see the THET resource ‘Project Monitoring’</td>
</tr>
<tr>
<td>What expertise is needed? Does the partnership already have this available, where? What is the expert’s availability? Etc.
b) Who has oversight for gathering the data? How much time do they have available to do this? Is it a new responsibility or one they are already doing i.e. how will it impact on their role? Are they motivate</td>
<td>For data use, consider the stakeholders that will be interested and how best to present the data for those stakeholders.
a) How will you bring the data together – e.g. in a meeting, by collating forms, online?
b) What expertise is needed? Any computer software? What evaluation question is the analysis addressing?
c) Forums to feedback results to internal and external stakeholders? When? Informal feedback systems for your direct beneficiaries – how can you communicate positive changes in their behaviour to the health workers themselves? Who will do this, when, and how often?
d) Will this data explain how well your methods are working? If so, how will you move from results to actions?
e) Who is responsible for the above points in relation to this indicator? Why this person?
Also see (c) under column Data Gathering Methods</td>
<td>Costs: for each aspect of data gathering and use, from materials to transport and telecommunications.
Frequency and Timeframe: how often must you collect the data? When do you need the data by and is this feasible given the time and human resource available</td>
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THANK YOU!


Q&A

Monitoring and Evaluation Plan Example

indicator	Source of information (Means of Verification	Baseline at project outset	Data gathering methods: a) Expertise needed b) Responsibility	Data use: a)Collation b) Analysis c) Feedback d) Process review e) Responsibility	Costs Frequency and Timeframe
Number of nurses scoring 75% or more in post-training assessment	Assessment records	No baseline data; Nurses observed to lack skill x.	a) Technical knowledge to score tests therefore, Ugandan volunteers delivering training b) Ugandan volunteers delivering training and assessment.	a) Paper assessment scored typed into Excel b) Basic analysis: numbers scoring 75%, by training session. Results to inform question on efficacy of training delivery.	**Costs**: printing costs for hard copy assessments. Telecoms costs for developing country partner coordinator to communicate results and concerns to partners Frequency and **Timeframe:** After each training session (training happens once a quarter, lasting 2 days). Analysis of first 2 sessions must happen within one week sothat any changes needed can be incorporated into next training. Feedback to institution management to happen following each training session with a summary and actions at the end of 2 training sessions.