Goal and Introduction to Monitoring & Evaluation (Developing deliverables & Milestones)

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Training in Research Management for UVRI, 27th June 2023
Presentation

1. Introduction M & E

2. What is M&E?

3. Why should we do it?
Introduction
Introduction

1. Project management is the use of specific knowledge, skills, tools and techniques to deliver something of value to people.

2. Projects are temporary efforts to create value through unique products, services, and processes.

3. Projects are amalgamations of tasks, activities, and deliverables that must be structured and executed carefully to achieve a desired outcome.

4. Before an outcome is achieved, each aspect of a project must go through phases of initiation, planning, and execution.

5. This process is known as the project management lifecycle, and it is the lifeblood of successful projects.
Project planning is a procedural step in project management, where required documentation is created to ensure successful project completion.

Project planning is at the heart of the project life cycle, and tells everyone involved where you’re going and how you’re going to get there.

Provides a basis to establish the business requirements, costs, schedules, deliverables, resource plans.

Often the most challenging phase for a project manager.
Project planning phase has two interchangeable terms that continuously crop up i.e. “deliverables” and “milestones”

Both set out waypoints that allow a project’s progress to be judged and provide a focus for a team to work towards, but are they the same?

Deliverables & milestones are common tools to determine and verify the progress and measure the outcome of a project.

Help to increase the visibility and the impact of the project by disseminating its outcome.
**Deliverable**

- Is a product or service that denotes the completion of a project phase **or**
- Is the output or the result of the project activities
- E.g. can be the designs or videos that have been created in that phase

**Milestone**

- Is the completed project phase or the measurable & important accomplishment necessary to achieve a goal **or**
- Specific events in a project's life cycle.
- E.g. can be the step of creating advertising content.

Some project milestones may not have tangible deliverables, while some may have several deliverables at intervals. However, the more likely you are to measure the deliverables, the easier it is to track the forward progress of the milestones.
What is M & E?
What is M&E?

• Shouldn’t our work speak for itself?
• Just a way to make more work?
• Funders don’t trust us?
• Is our activity on track?
• Are we doing the right thing?; Right and efficiently?
• Are there better ways of doing it?
Monitoring is the continuous assessment of a programme or project in relation to the agreed implementation schedule.

Evaluation is a systematic assessment of all elements of a program to assess its worth or relevance.

M & E is a process of continued gathering of information and its analysis, in order to determine whether progress is being made towards pre-specified goals and objectives.
<table>
<thead>
<tr>
<th>Monitoring</th>
<th>Evaluation</th>
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</thead>
<tbody>
<tr>
<td><strong>Continuous</strong>: day-to-day, routine, ongoing activities</td>
<td><strong>Periodic</strong>: important milestones (mid-term or end of project)</td>
</tr>
<tr>
<td>Documents progress using selected indicators/activities</td>
<td>Provides in-depth/comprehensive analysis</td>
</tr>
<tr>
<td>Focuses on <strong>inputs, activities and outputs</strong></td>
<td>Compare planned with actual achievements</td>
</tr>
<tr>
<td>Provides warning signs to managers</td>
<td>Focuses on <strong>outcomes and impacts</strong></td>
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<tr>
<td>Looks at process at the output level</td>
<td>Provides managers with strategy and policy options if corrective action is needed</td>
</tr>
<tr>
<td></td>
<td>Considers results at outcome level</td>
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</table>
why should we do it?
Importance of M & E

1) Tracking resources & provide feedback on progress
2) Improve program implementation - managers
3) Informing future decisions based on accurate, evidence based information
4) Promoting accountability
5) Demonstrating impact
6) Identify lessons learned
7) Preserve institutional memory
## Common Terms of M & E

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Inputs</td>
<td>resources required to achieve outputs, including money, equipment and human resources</td>
</tr>
<tr>
<td>Activity</td>
<td>Work performed in line with the plan</td>
</tr>
<tr>
<td>Outputs</td>
<td>tangible results of the input – cattle treated, farmers trained, agents established.</td>
</tr>
<tr>
<td>Outcomes</td>
<td>how the outputs have contributed to an expected change in the situation which was to be addressed by the project</td>
</tr>
<tr>
<td>Objectives</td>
<td>contribute to the overall goal and allows measurement of the success of the programme</td>
</tr>
<tr>
<td>Impact</td>
<td>the long term result of the outcome. The impact includes the overall social, economic, and other developmental effects that the outcomes of the programme have had the community.</td>
</tr>
<tr>
<td>Indicators</td>
<td>measure the achievements of the outputs, outcomes and objectives.</td>
</tr>
</tbody>
</table>
Tools or M & E Planning

1. M & E Plan
2. M & E framework or Logical Framework (Logframe)
3. Theory of Change
THANK YOU!

Q & A

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Developing an M & E plan
What is a plan?

It’s a detailed way of doing or to achieve something.

A method devised for making or doing something or achieving an end,
What is an M & E Plan?

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

Or

- 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.
When and Why?

• M & E plan should be created right in the beginning when the project interventions are being planned.

• Helps to define, implement, track and improve a M & E strategy within a particular project(s).

• Helps to ensure that there is a robust system in place to monitor every little intervention and activity of the project and evaluate their success.

• Helps to identify opportunities and barriers as a team in the planning stage with a focus on problem-solving and maximizing impact.
Steps in developing and M & E plan

Helps understand what to measure

**Indicators**
Specific, Measurable, Relevant, Timely

Sources & methods

Who is responsible

How & whom to report

Knowledge and learning

Develop Objectives

Outcomes and Outputs

Data Collection

Data Analysis

Reporting & Dissemination

Feedback and Learning Plan

Note: Essential component of the project or program
An M&E Plan should be

• Practical
  • Accessible to intended users
• Feasible, realistic, & diplomatic
• Legal & ethical
• Accurate
  • Reveal technically correct information
## M & E Plan template

<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>DEFINITION</th>
<th>BASELINE</th>
<th>TARGET</th>
<th>DATA SOURCE</th>
<th>FREQUENCY</th>
<th>RESPONSIBLE</th>
<th>REPORTING</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How is it calculated?</td>
<td>What is the current value?</td>
<td>What is the target value?</td>
<td>How will it be measured?</td>
<td>How often will it be measured?</td>
<td>Who will measure it?</td>
<td>Where will it be reported?</td>
</tr>
<tr>
<td>Goal</td>
<td></td>
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<tr>
<td>Goal</td>
<td>Percentage of Grades 6 primary students continuing on to high school.</td>
<td>Number students who start the first day of Grade 7 divided by the total number of Grade 6 students in the previous year, multiplied by 100.</td>
<td>50%</td>
<td>60%</td>
<td>Primary and high school enrolment records</td>
<td>Annual</td>
<td>Program manager</td>
</tr>
<tr>
<td>Outcomes</td>
<td>Reading proficiency among children in Grade 6.</td>
<td>Sum of all reading proficiency test scores for all students in Grade 6 divided by the total number of students in Grade 6.</td>
<td>Average score: 47</td>
<td>Average score: 57</td>
<td>Reading proficiency tests using the national assessment tool.</td>
<td>Every 6 months</td>
<td>Teachers</td>
</tr>
<tr>
<td>Outputs</td>
<td>Number of students who completed a summer reading camp.</td>
<td>Total number of students who were present on both the first and last</td>
<td>0</td>
<td>500</td>
<td>Summer camp attendance records.</td>
<td>End of every camp</td>
<td>Teachers</td>
</tr>
</tbody>
</table>
Group work: Developing an M&E Plan

• Break up into groups and develop an M & E plan on your chosen area of focus (problem)
• Shall present the work in groups and refine it as we go along