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## **Module 6: Summary and Key Messages of the Introduction to the Designing and Implementing M&E Systems Course**

Welcome to the final module of the online version of AKF's Designing and Implementing Monitoring and Evaluation Systems Course

In this module, we will summarize the key learnings of the course.

It is hoped that this course has helped you in gaining a greater understanding of:

- The difference between monitoring and evaluation
- The ten steps in establishing a monitoring and evaluation system
- Developing a monitoring and evaluation plan and the elements that are included in this plan.

In Module one we covered the basic concepts for monitoring and evaluation. In summary:

- Monitoring is the “systematic collection of data for selected indicators to demonstrate the extent of progress, achievement of results and the use of allocated funds.”
- Monitoring is routine and done continuously
- Evaluation is a periodic exercise with the aim of determining relevance, efficiency, effectiveness and sustainability
- M&E is everyone's responsibility, not just the M&E unit
- Robust M&E systems are systems which are coordinated between sectors, programmes and M&E units

We monitor for three reasons

- Accountability – both upwards and downwards
- Learning; and
- Decision making



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### **STEP 1**

The first step in establishing a monitoring and evaluation system is to define your results. In doing so, we develop results Frameworks. This is a visual depiction of your strategy and the logic of the changes you expect to see as a result of your inputs and activities.

There are various levels of results. Lower level outcomes, higher level outcomes and the goal. These are linked together by a results chain, or a cause and effect relationship.

The higher up the results chain you go, the more time it takes for the change to happen. In addition, the less control the program or project has in achieving these results.

Results should also be S.M.A.R.T

Result statements are generally written using a 'directional verb' in the past tense. These directions can either be positive or negative.

When writing a result statement, it should include WHAT change we want to see, for WHOM the change is intended, and WHERE this change is expected to happen.

### **STEP 2**

In step 2, we developed indicators to measure the change in results.

- Indicators are 'signals' to measure expected results at each level of the results chain
- Indicators should be stated neutrally
- Indicators at higher and lower outcome levels measure developmental change, whereas indicators at output level demonstrate a completed process
- Indicators at the higher level outcome are for the targeted population, not the broader population
- Indicators at the outcome levels should use the unit of percentage and not number
- Indicators should be disaggregated, where relevant
- Where indicators are used to count people, they should always be sex-disaggregated
- Don't add too many indicators unnecessarily. Follow the criteria when choosing or developing your indicators



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### STEP 3

In Step 3, we looked at how to collect data.

This involves selecting the source of information – from where, from what or from who the information will come.

These sources can be primary or secondary.

This step also involves deciding upon which method to use to collect the data or information.

Here we ask the question, “How will we obtain the information we need from our sources?”

In determining a method, there are several considerations.

A qualitative approach, or method, is used when:

- We want narrative or in-depth information
- Do not need to quantify our results
- Answers the question “Why and How” questions

Quantitative methods on the other hand are used when:

- We want to conduct statistical analysis of the data we collect
- Want to be precise
- We want to cover a large group or population
- Answers the “what” question

It is important to combine methods to understand the information more fully, especially for complex indicators at the higher levels

Finally, in this step, we must determine the frequency at which we collect data. We must also determine who will be responsible for the collection, analysis and reporting.



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When selecting a frequency, we must take into consideration things such as the seasons, school semesters, major activities, and our reporting schedules.

### **STEP 4**

In Step 4 we looked at assumptions and risks.

Assumptions are factors that we rely on to be in place for expected results to be achieved successfully. These assumptions can be internal or external to the organization.

Risks on the other hand, are factors or events that can potentially impede the successful achievement of results, if they occur.

Just like results, risks also need to be monitored through key indicators. While these are not performance indicators they are still signals to tell us what is happening.

### **STEP 5**

Step 5 explored grouping the selected indicators.

Grouping is the process of categorizing our indicators to facilitate more coherent and synergistic data collection.

This means identifying indicators for which data can be collected using the:

- SAME method or tool
- Ideally from the SAME source
- And at the SAME frequency or time

An advantage of doing this is to help make tool design more efficient. It will also ensure that multiple indicators can be included on one tool. A second reason is that grouping indicators forms the basis for planning data collection overall. It will also assist us to see where the same methodology and tool can capture more than one indicator.



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## STEP 6

Finally, in Step 6 we looked briefly at developing output monitoring tools.

Every output monitoring tool must have a tool name. It should also include a short description of the tool which includes information such as:

- The purpose of the tool and what does it track
- Who should use the tool
- When and how often is the tool administered
- To whom the tool should be submitted when it is complete
- When the data was collected
- Geographical references
- The indicator references

All tools must be pre-tested or piloted. This will facilitate making the necessary changes before it is administered.

Finally, spot checking of output monitoring tools once information is collected should be done. This means checking for completeness, timeliness, reliability, validity and traceability.

This brings us to the end of the introduction to Designing and Implementing Monitoring and Evaluation Systems Course.

In this course we have aimed to provide a brief overview of some of the basic concepts and processes in establishing a robust monitoring and evaluation system. We hope that specifically you have:

- Developed a greater understanding of the guiding principles of sound monitoring and evaluation systems
- Developed a greater understanding of how to use Results Based Management to develop robust monitoring and evaluation systems; and
- Developed a greater understanding of how to strengthen monitoring and evaluation systems in our units



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While there are many elements and intricacies in designing and implementing such systems, we hope that it will assist you in your own units, regardless if it being applied to a new project or programme or to strengthen an existing one.