Introduction to process of Project Monitoring

CCC M&E Learning Forum, Diakonia Center

21st June 2019

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Disclaimer

- Session Materials are modified based on the suggested needed from the discussion with CCC organizers, thus it doesn't necessary fully reflect how CRS way of working MEAL.

- The CCC learning forum is more like a knowledge sharing session rather than a training session, thus it doesn't intended to very informative, comprehensive and rigorous session.

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Session Objective

- Equip participants to key MEAL team and Monitoring definition

- Equip participants on what, when, why and how to conduct project monitoring

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Short Quiz on project monitoring
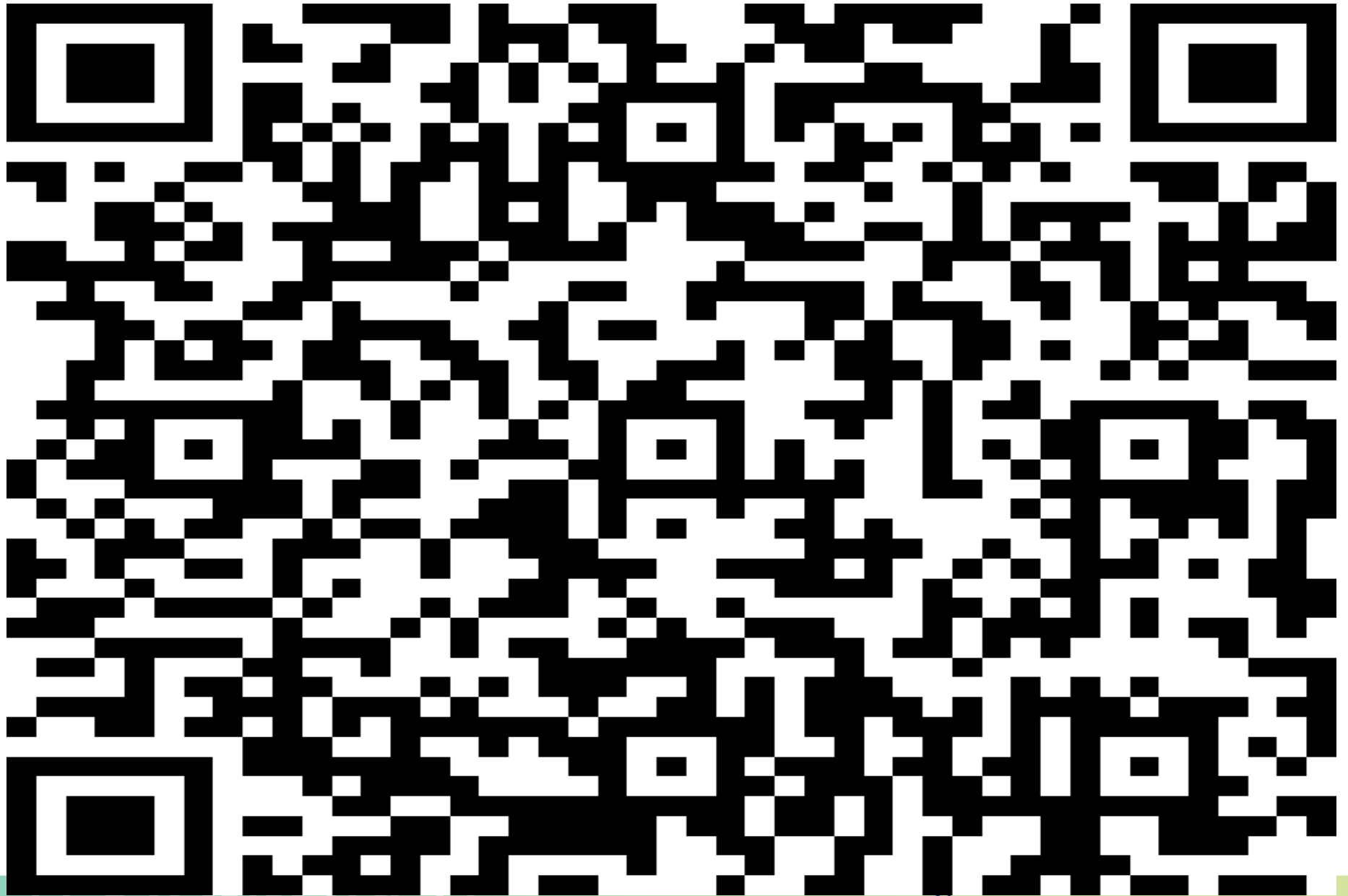
Monitoring

- is a **continuous process of collecting, analyzing, and documenting information** in order to report on progress towards achieving agreed project objectives. It provides an ongoing opportunity for learning. Top-quality monitoring information assists timely decision-making, ensures accountability, and provides the basis for evaluation and learning.

(ProPack II definition).
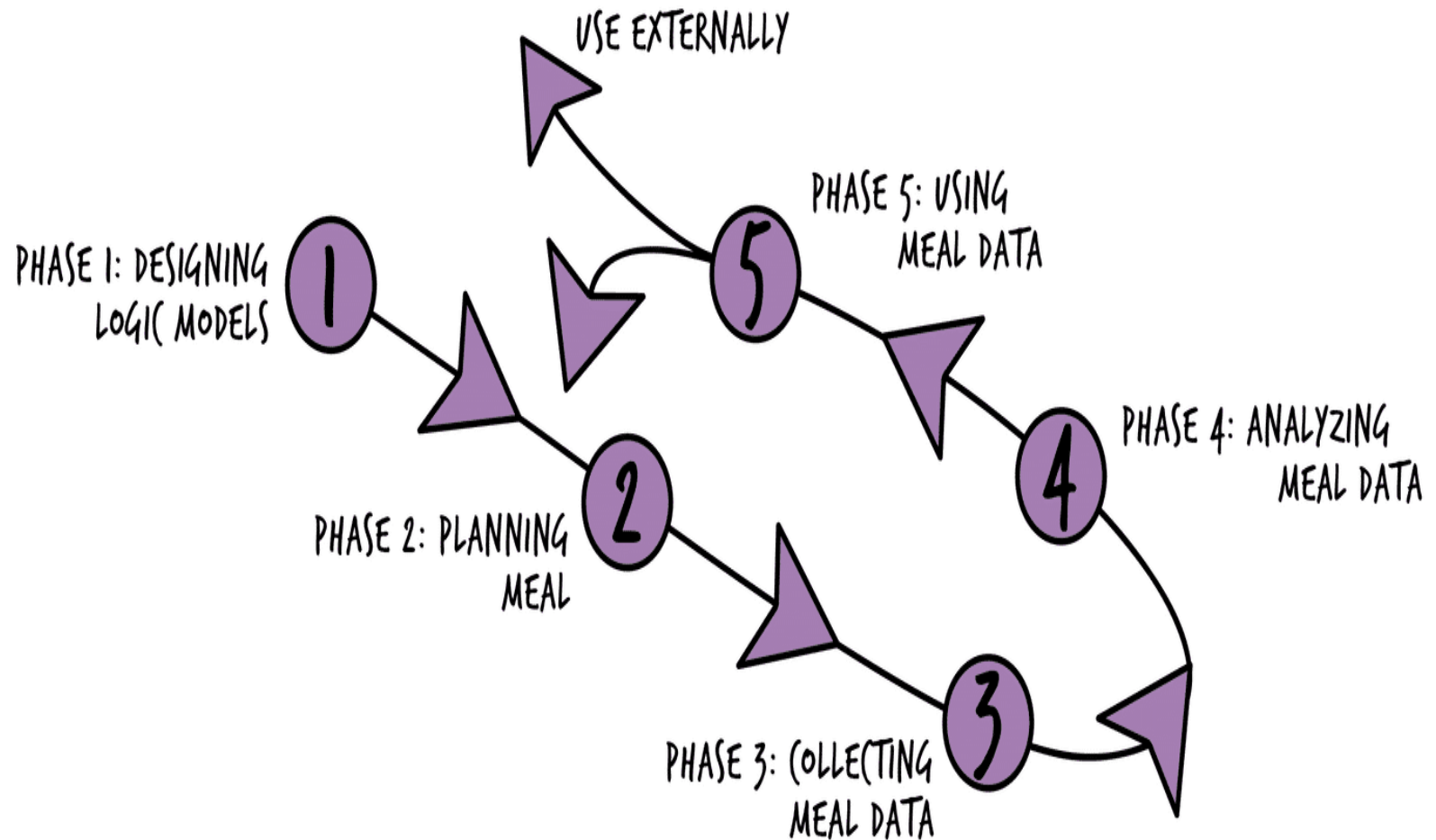
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Evaluation

- is a **periodic, systematic assessment of a project's relevance, efficiency, effectiveness, impact and sustainability** on a defined population. Evaluation draws from data collected via the monitoring system, as well as any other more detailed data (e.g., from additional surveys or studies) gathered to understand specific aspects of the project in greater depth.

(ProPack II definition)

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Level	Definition
Inputs	Inputs are the people, training, equipment and resources that we put into a project, in order to achieve outputs.
Outputs (Process)	Outputs are the activities or services we deliver, in order to achieve outcomes. The processes associated with service delivery are very important and involve quality, unit costs, access and coverage
Outcomes (Coverage)	Through the provision of good-quality, economical, accessible, and widespread services, key outcomes (short term or immediate effects) should occur. Outcomes are changes in behaviour or skills.
Impacts	The above-mentioned outcomes are intended to lead to major measurable impacts (long-term or ultimate effects), particularly reduced poverty or reducing mortality.

Five Phase of MEAL Cycle

USE EXTERNALLY

PHASE 1: DESIGNING LOGIC MODELS

PHASE 2: PLANNING MEAL

PHASE 3: COLLECTING MEAL DATA

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Why project monitoring matter?

- Analyze current situation

- Identify issues and find solution

- Identify project needs

- Discover trends and patterns

- Keep project activities on schedules

- Measure progress against outputs

- Make decision about human, financial and material resources

Causal Pathway Framework

Monitoring

Evaluation

Inputs → Activities → Outputs → Outcomes → Desired Impact

Did you have the Inputs you needed?

Were your Activities carried out as planned?

Were the planned Outputs achieved?

Did the Outcomes/ Effects occur

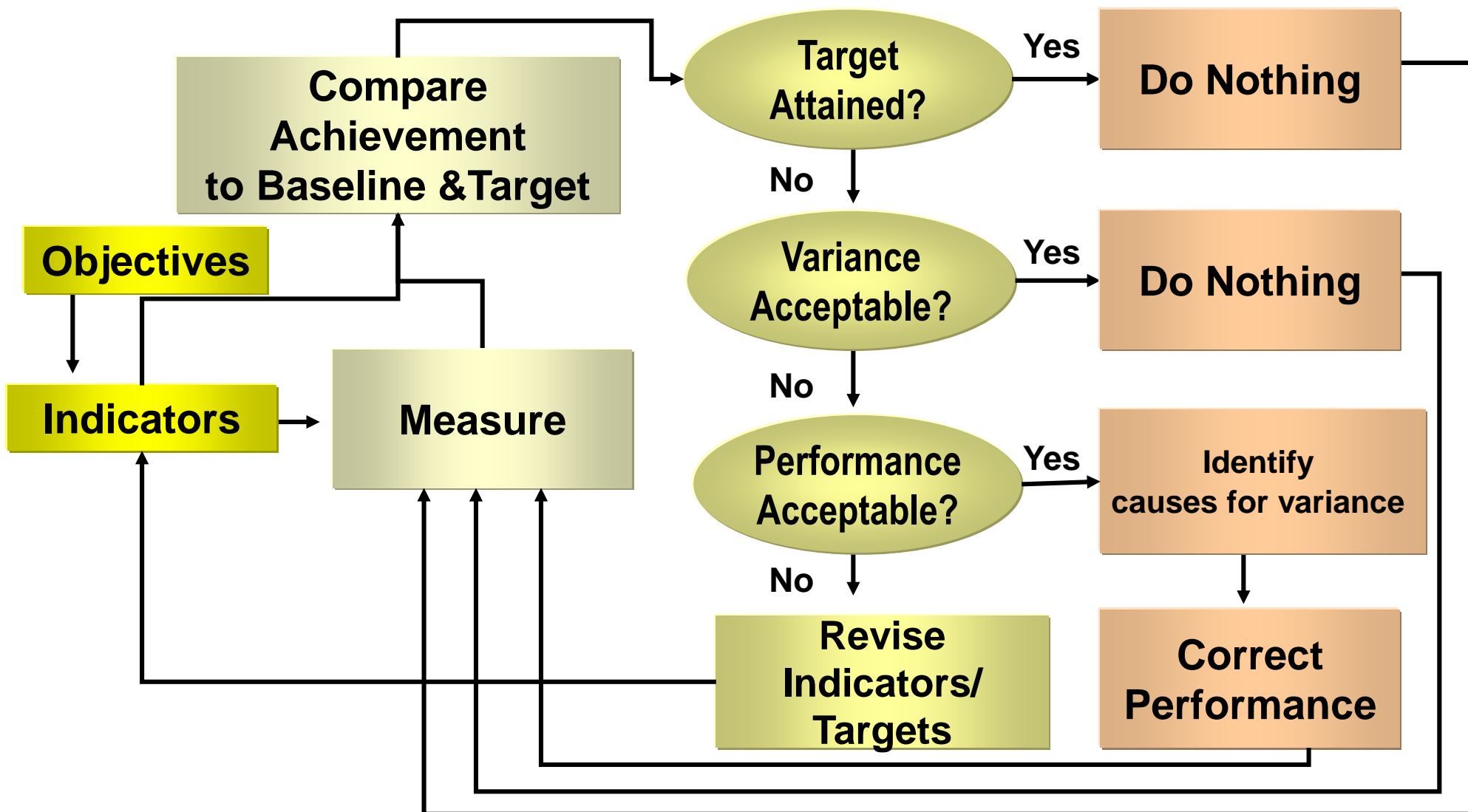**Was Impact achieved?**

What/when do we monitor?

- **Purpose:** Tracking inputs, activities and progress toward achievement of agreed outcomes and impacts

- **Frequency**: Regular and ongoing during project implementation (depending your workplan basically monthly or quarterly)

- **Responsibility:** Activities are conducted by members of the project team

- **Use of Data** : Informs timely decision-making and short-term corrective action in support of adaptive management

Source: CRS MEALDPro, p. 3

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How to monitor project?

- Remotely:

  - Review the project data and reports and seeking for any insights or burning questions

  - Comparing the achievement of key inputs, activities, outputs indicators against the targets and workplan

- Meeting (i.e. face-to-face or online):

  - Hold a project review meeting to seek or identified project challenges, key success and lesson learned and determined key action points to address the challenges

- Field monitoring visits:

  - Conduct the field visits to explore more additional insights at the ground

  - Reflecting and debriefing the findings with relevant project staffs

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Managerial Decisions in the M&E Process

Key Messages

- Monitoring aims at tracking inputs, activities and progress toward achievement of agreed outcomes and impacts

- Monitoring could help the program/project team to know about the project progress, trend and needed to make any correction action or adjustment to the project strategy before its too late.

- Monitoring can do remotely or online with project team or if the project have resources could do the field monitoring and collect more data from the project beneficiaries or participants

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Data Collection
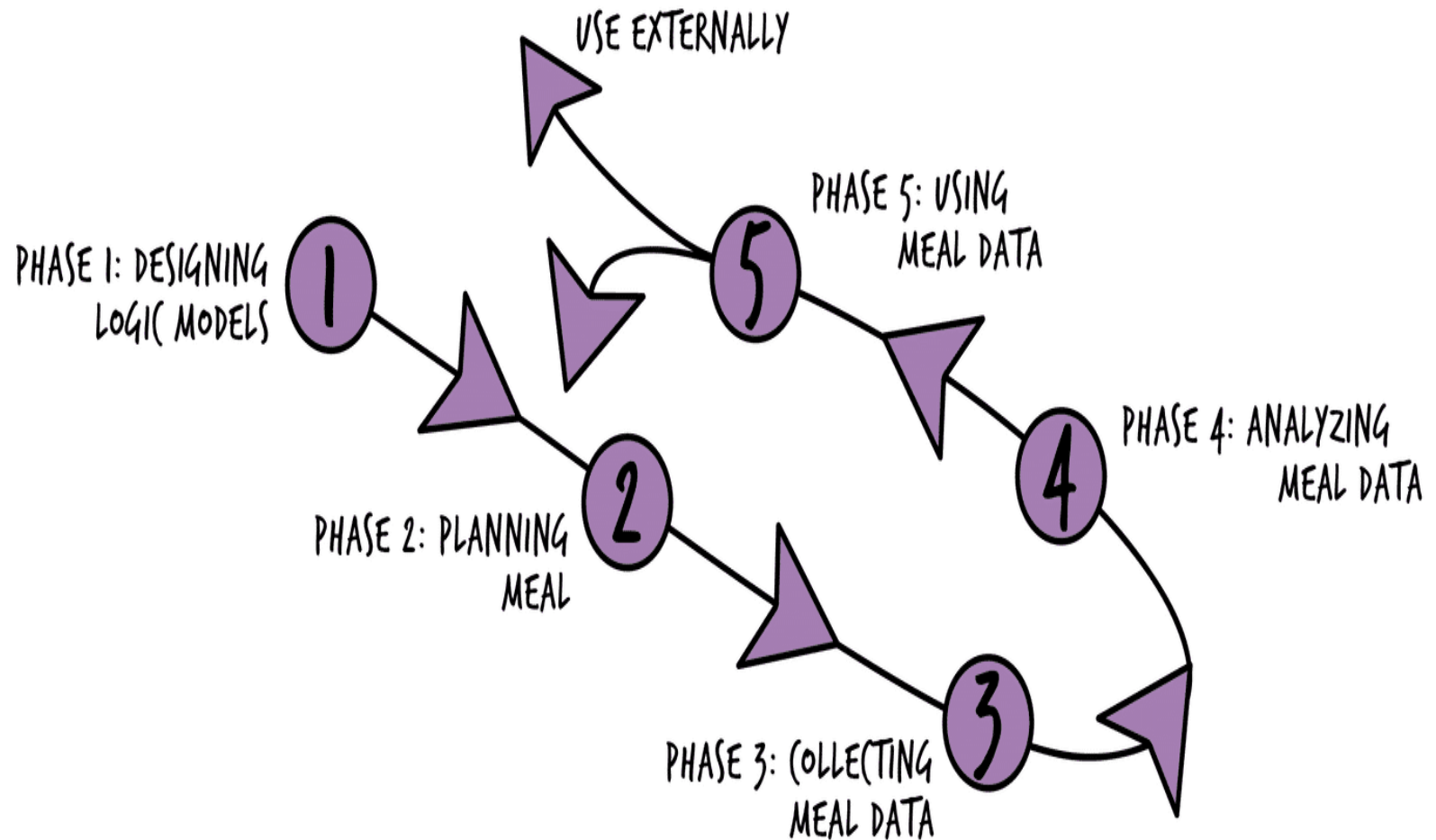
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Session Objective

- To describe the steps in developing the implementing tools for quantitative and qualitative data collection

- To identify key approaches for data collection implementation strategies

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Performance Management Plan (PMP)

OBJECTIVES STATEMENTS	INDICATORS	DATA COLLECTION				MEANS OF ANALYSIS		USE OF INFORMATION
		METHOD	FREQUENCY	PERSON RESPONSIBLE	RESPONDENTS	TYPE OF ANALYSIS	COMPARISON GROUPS	
PMP								
STRATEGIC OBJECTIVE 1								
STRATEGIC OBJECTIVE 2								
INTERMEDIATE RESULT 1.1								
INTERMEDIATE RESULT 2.1								
OUTPUT 1.1.1								
OUTPUT 1.1.2								
KEY ASSUMPTIONS								
ASSUMPTION 1								
ASSUMPTION 2								

Principle of designing data collection tools

- Collect "Needs to Know" data only not "Nice to know"

"Do not COLLECT data unless somebody is going to USE IT"

Quantitative Data collection Tools

- Quantitative data is collected using a questionnaire. A Questionnaire is a set of questions designed to elicit the specific info from respondents

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Quantitative data collection tools - guideline

- Limit number of questionnaires developed

- Be consistent

- Use close-end questions

- Include skip logic, don't know and other option

- Limited question to one piece of info

- Use exhaustive list of responses

- Choose the right medium

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Common Problems 1

Do children use the latrine and water tank at school?

__ Y __ N

OPTION 1:

Do children use the latrine at school? __ Yes __ No

Do children use the water tank at school? __ Yes __ No

OPTION 2:

Which of the following facilities do the children use at school: (check all that apply): __ latrine __ water tank __ other (specify)_____

Common Problems 2

How far is your nearest water source from your home?

Improved Questions:

How much time does it take you to reach the nearest water source?   _____ minutes

How many kms away is the nearest water source from your home? ____ km.

Common Problems 3

Are you following Ministry of Education guidance on forming Parent and Teacher Association (PTAs)?

Is the teacher using Teaching and Learning Manual (TLM) correctly?

Improved Questions:

Were elections called when forming parent teacher associations? __ Yes __ No

Which materials did the teachers or students use during the lesson? *Check all that apply.*

__ flashcards __ posters

__ pocket board __ other (specify)_____

Common Problems 4

What percentage of your average monthly income is from remittances?

Improved questions:

What was your household income last month (in USD)?   _____ USD

What was the amount of remittances that your household received last month (in USD)?

_____USD

Small Groups Works – quantitative data collection tools (15 mins)

- In your table group, drafting the "Meeting Monitoring Checklist" by reflecting to the key questions below:

  – What are the required info need for the meeting?

  – What make a good meeting based on your experiences?

  – Capture the draft in assigned representative of your groups will come back to refine the tools and use it for the this afternoon session.

  (See the sample of the Session 2 - Meeting Monitoring Checklist - Example)

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Qualitative data collection tool

- The most frequently used Qualitative data collection tools include semi-structured interviews (also known as KII) and focus group discussions. Other including KII, Historical profile, PRA/RRA, Community Mapping …..etc.

- The semi-structured interview is a guided discussion between an interviewer and a single respondent. It is designed so the interviewer can explore and understand the rich depth and context of the respondent's perspectives, opinions, and ideas.

- A Focus group discussion is guided discussion btw respondents in a groups and its provided opportunity for a small groups of participants to interacts with each other, build on ideas and present divergent perspectives.

Qualitative data collection tools - guideline

- Plan the question: the key to strong qualitative data collection is to carefully plan for the questions that will frame the conversation. Prepare the questions ahead of time, carefully scripting them and documenting them in an interview or discussion guide.

- Use open-ended questions: Starting with opening questions to initiate the exploration of atopic by raising and broodingly exploring an issues then follow up with probing question that elicit more details explanation about the a response.

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Steps for successful data collections

- Step 1: Translate your data collection tools

- Step 2: Train data collectors and test your tools

- Step 3: Revise and finalize your tools

- Step 4: Plan for implementation

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CATHOLIC RELIEF SERVICES

Data Analysis

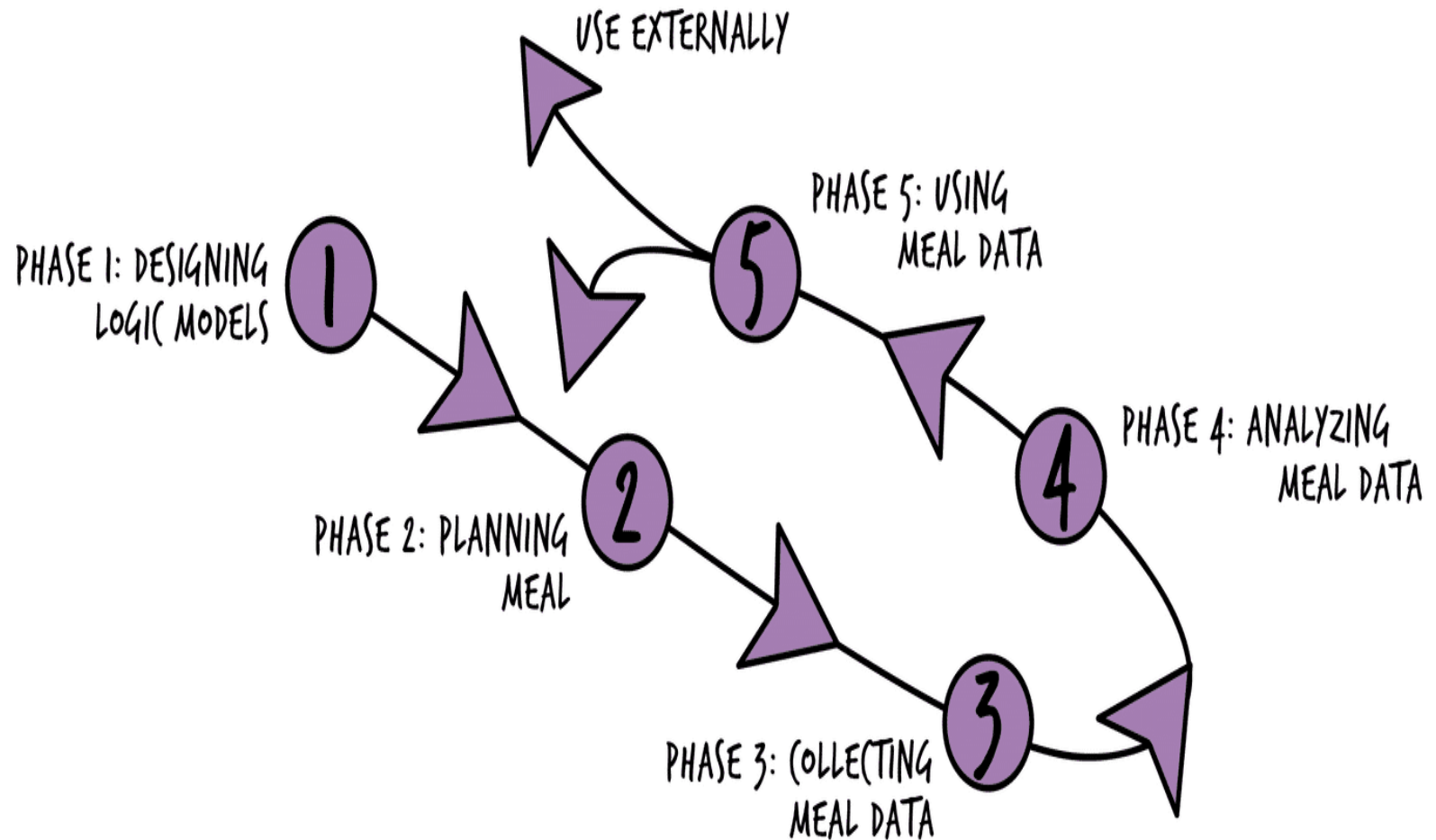CCC M&E Learning Forum, Diakonia Center

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Session Objective

- What is data analysis?

- Key practical tips for quantitative analysis

- Key practical tips for qualitative analysis

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What is Data Analysis?

Data Analysis is the process of bringing order and structure to the collected data.

Objective of Data analysis is to provided timely, relevant responses to stakeholders; learn effectively; inform required reports; and generally find ways to make your data useful as possible.
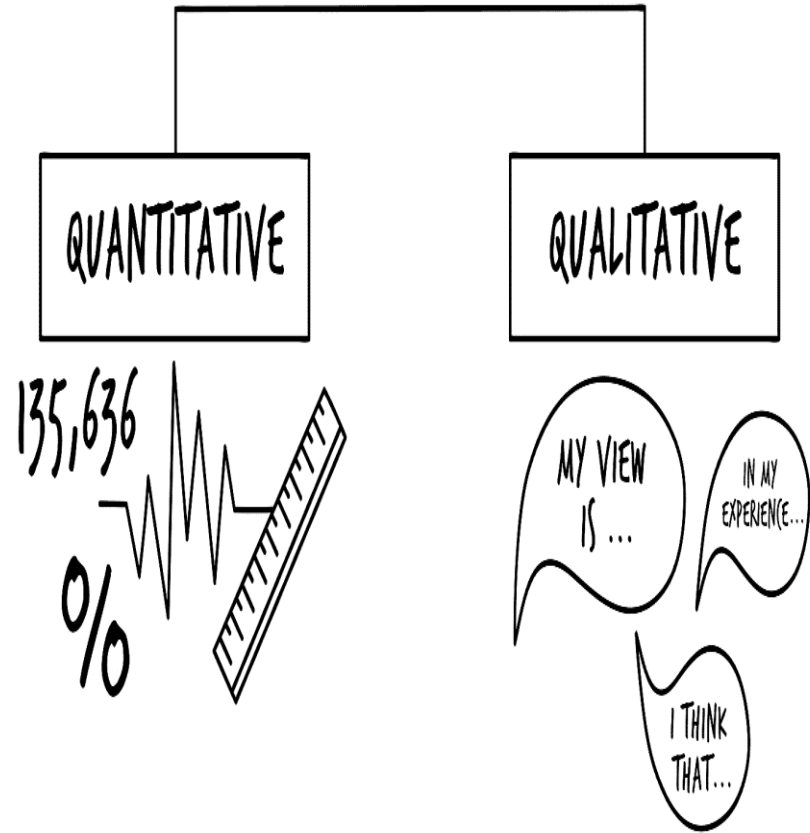
Performance Management Plan (PMP)

PMP

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ASSUMPTION 2								

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Developing an Action-led Information System: making it simple and sustainable

DATA COLLECTION
- start small & add slowly
- collect easily available data
- use clear & std definitions
- training & support is vital
- use minimum no. of tools
- link indicators to local & national issues

DATA HANDLING
- regular quality checks
- clear flow of information

USE OF INFORMATION
- programme management
- planning
- budgeting

ANALYSIS
- simple tools & calculations
- don't over-rely on computers – useful slaves

INTERPRETATION
- regular discussion
- monitor trends

PRESENTATION
- tables & graphs
- reports
- discussion
- feedback

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Guiding Principles

Decision for Action

Action

Data for Decision

Decision

Information
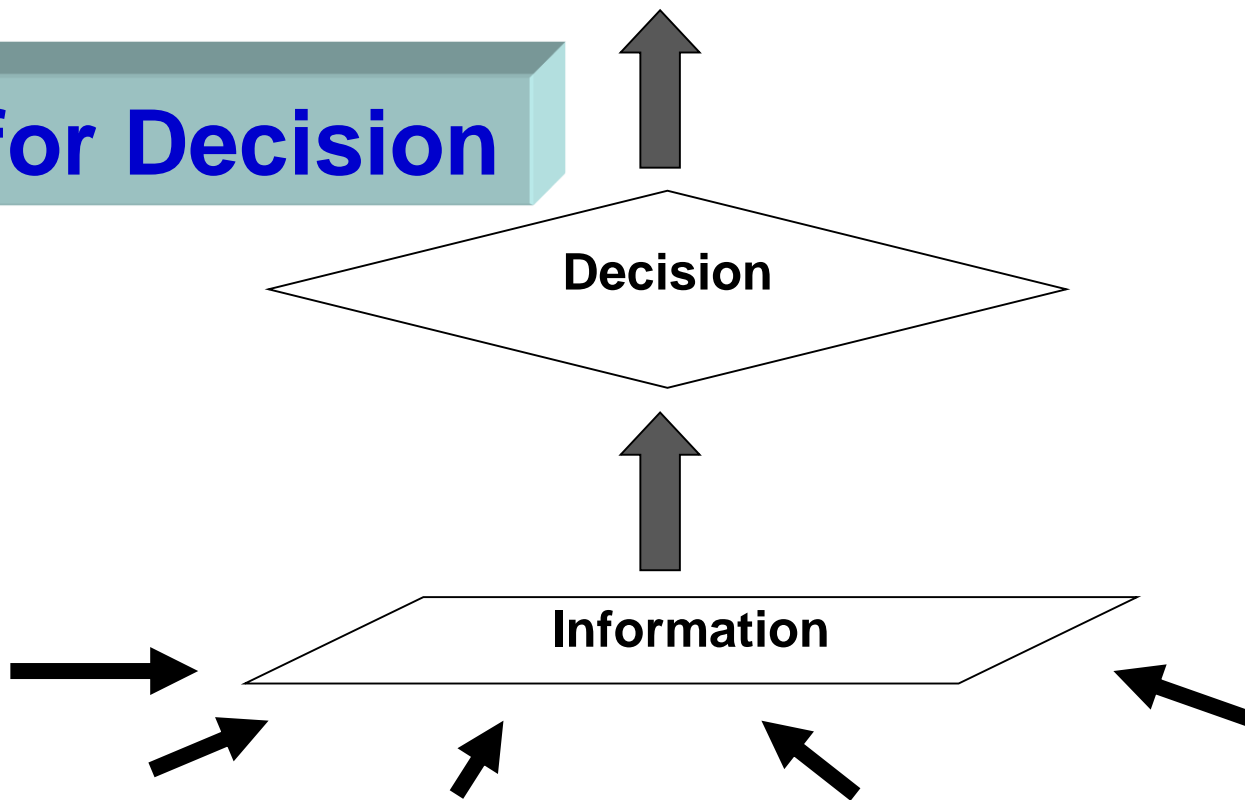
Quantitative Data Analysis
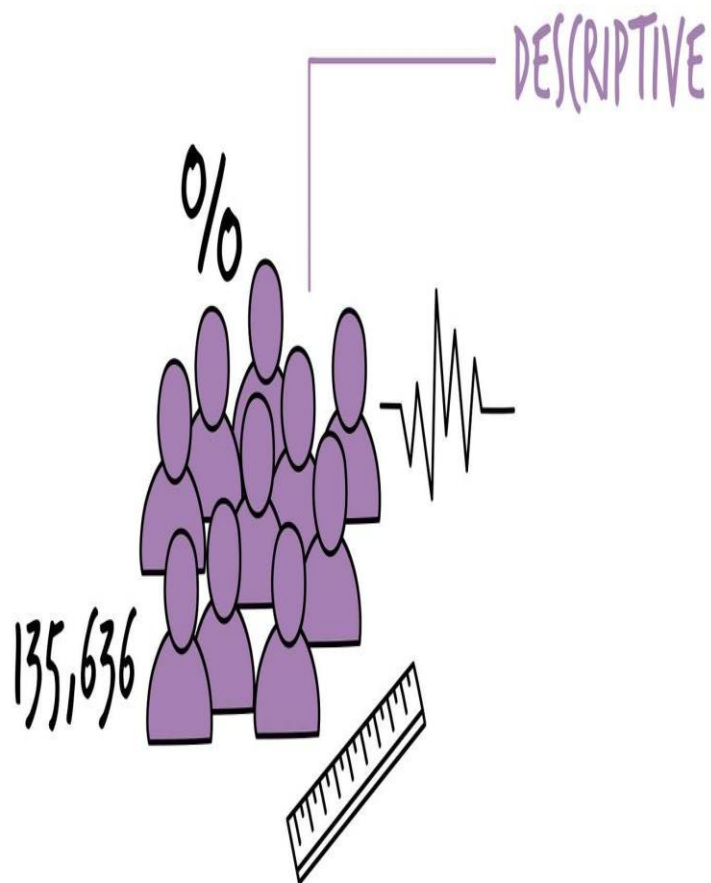
- There are two kinds of quantitative analysis: descriptive and inferential.

- Descriptive Data Analysis: is the analysis of a data set that helps you describe, show or summarize in a meaningful way, so that pattern might emerge. Its contains 3 categories of descriptive statistics 1) measures frequency (no. of occurrence of a particular value such as frequency, and cross-tabulation), 2) measure of central tendency – these are the mean, median, and mode and 3) measure variability that measure the extend to which data points in data set diverge from the average and form each other (range and standard deviation)

DESCRIPTIVE

%

135,636

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Qualitative Data Analysis

- Qualitative analysis is working with all the notes collected from interviews and focus group discussions and identifying key themes and findings, including among subgroups if you have them.

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Qualitative Data Analysis - Process

1. Prepare your data: Checked, completed, label and add ID number

2. Get to know your data: Read, Re-read, Re-read again the text

3. Focus on the analysis: Review purpose and way info will be used and identified major questions

4. Code and categorized your data: Mark and code key themes, define categories and sub-category

5. Identify patterns and connections: Looking for similarity and differences within category, relationship or relative importance

6. Interpret your data: Based on the purpose and learning/research questions

7. Report your finding: Develop outline of your major points, include meaningful quotes or visual display, if appropriate

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Sample Qualitative Data Analysis Matrix

Qualitative Analysis Matrix: "Access to water meets my household consumption needs."

Location	Large households	Small households
Village 1	Access: Generally OK, but need to visit water point often during the day. Consumption needs: No consensus on whether 30 L per person per day is enough. Some require more for washing and cooking than others. Location: Still too far away for some. No consensus. Quality: Smells and tastes different, but generally acceptable.	Access: Much better than before. Consumption needs: Meets consumption needs. Consensus that 30 L per person per day is acceptable. Location: New location is not safe for children, so need to send adult or older child to collect water. But happy overall with the fact that it is closer. Quality: Smells and tastes different, but much better than before.
Village 2	Access: All agree that the new water point location is a great improvement. Consumption needs: 30 L per person per day is definitely not enough for large families. Location: Large families need more water on average and the new location allows them to go more often to get water more easily. Quality: No specific complaints.	Access: Some complain that some families have more access than others in the new location. Consumption needs: 30 L per person per day meets consumption needs. Location: Not as centrally located as it could be. Quality: No specific complaints.

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S Setup

Q Quote

C Comment

A template for structuring the paragraphs describing your qualitative results

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Presenting Qualitative Data: "The Formula"

S

Set up

- The first sentence is critical
  - States the key point or message of the paragraph (a summary result or finding)
  - Can serve as a transition from the previous period
  - "Most people…"
- Second sentence provides additional detail or context to the finding (look at the matrix and provide detail to support your key point)
- The third sentence sets up the quotation, including participant characteristics and context.

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Presenting Qualitative Data: "The Formula"

Q

Quote

- Next, include the quote

- A block quotation should be used for passages of 40 words or more

  – Indent half an inch. (You do not have to select a long quote)

- Short quotes (less than 40 words) can be included in line with the rest of the paragraph. Use quote marks "…"

- Information that should be included with the quote – age group, sex, geographic area. (Where should you have this information?)

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Presenting Qualitative Data: "The Formula"

C

Comment

- There should ALWAYS be at least one sentence following a quotation.

- Use these comment sentences to stress important parts of the quote, tie it back to the theme you're building and move towards the next paragraph.

"The Formula" - Example

S

Unlike with men, a lack of trust was a primary barrier to the female respondents' participation in CRS' SILC programming. All but one of the female respondents indicated that they were not comfortable giving their money to another community member. When asked about how she felt about SILC, a female resident of Phnom Penh, who participated in other CRS activities, stated that:

Q

You have to know your neighbors well and feel secure with them to do SILC. They have your money! I don't think that my neighbors will take care of my money. What am I supposed to do, risk my money with these people?
(Female, 45-65 years old, Phnom Penh)

C

Similar to most of the other female respondents, this participant viewed SILC as a risk because she did not trust her neighbors to protect her money.

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Key message

- Know your information needed, Indicators and its disaggregation before working on data analysis

- Structured your data analysis based on the info needed and indicators

- Tailored presentation of the data analysis based on the audiences level of comfort and understanding and what key messages/attention you want to convey

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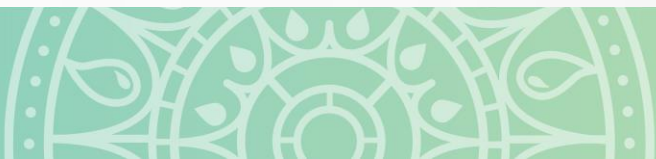
Monitoring Report Writing

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Session Objectives

- To equip participants on key guidance/checklist for conducting the project monitoring

- To share key tips for effective project monitoring report writing

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Five Phase of MEAL Cycle

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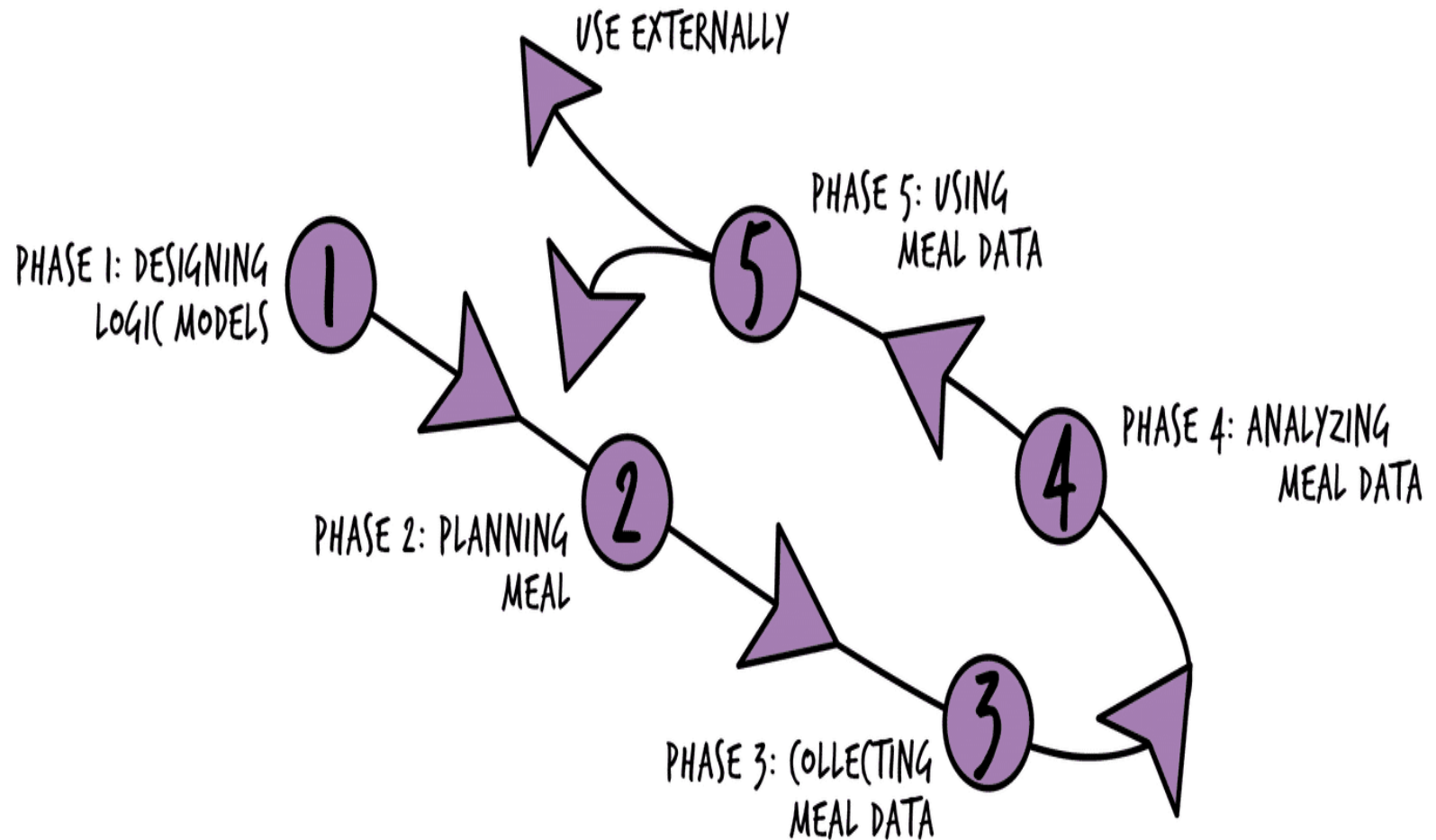
Project Monitoring Trip Process

1. Before conducting the monitoring trip

2. During the monitoring trip

3. After the monitoring trip

(in Pair, review the Session 3 - Checklist on Field Visit Guidance)

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Project Monitoring trip process

- Reflection questions:

  - What is your impression on the project monitoring trip process?

  - Is there any things missing?

  - Is the process feasible?

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Project Monitoring Trip objective

- In pair: How to effectively defined the project monitoring trip objective?

  - Review the project reports and ask critical questions on how the project result/data mean to our own achievement, what we need to find out more, what is issues to find out

  - Review the project workplan to determine what is data required to collect and what activities should already and will happen in the field

  - Review the previous trip report and see if there is any action to follow up

  - Any key burning issues or new guidance that need to updated to relevant staffs at the field or partners

  - Discuss with the partner and staffs on the support needed

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Project Monitoring trip – Common objectives

- To review and discuss project progress with project staffs and/or partners

- Follow up on previous monitoring trip action plan

- To meet with project beneficiaries to collect data for key indicators and their overall feedbacks

- To verify the data against the progress report as well as its supporting documents (program reporting and finance etc)

- To monitor and provide on the job coaching and mentoring to staff and/or partners on key projects activities (training, meeting, events)

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Project Monitoring plan template

- See Sample SoW or Field monitoring plan

- Discussion questions in pair:

  – What is your impress on the SoW or field monitoring plan?

  – What feedbacks you want would like to share?

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Project Monitoring Report tips

- Know your reader

  - Who are the intended report readers?

  - What do they need to know?

  - What specific questions need to be addressed?

  - When do they need the information?

  - Is there available guidance regarding the format and length of the report (e.g.,as specified by the donor, local government or your own organization)?

- Be clear and specific on the messages you want the intended readers to get their attention on

- Address the findings from the monitoring trips based on the monitoring trip objectives

- Keep it short and simple (depending how complexity is the monitoring report findings but it should not more than 10 pages long)

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Small group works

- In your table group, drafting the SoW for the project monitoring trip based on the design scenario provided. (15 mins)

- Review your meeting monitoring checklist in the morning session and completed the checklist. (15 mins)

- Then updating the result in the Project Monitoring Trip Report template provided (15 mins)

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Group Sharing

- Starting the group sharing on the project monitoring report exercise (20 mins each groups 2-3 mins)

- Reflection question:

  - Is there any findings differ from what your groups found?

  - Are the proposed action is actionable? Why?

  - What are one suggestion you have for the presenting team?

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Key Messages

- A good project monitoring report is start off with clear plan and SOW

- Know and clear on your purpose of the monitoring visits then bring required project documents and tools in response to those purposes

- Debriefing with relevant staffs before return and sharing the final report as well as follow up on the agreed action from the trip

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Key MEAL Learning Resource

- MEAL DPro E-learning: A free self-pace e-learning course on MEAL, go to www.kayaconnect.org then search MEAL DPro and create a username to learning

- CRS Institute for Capacity Strengthening: www.ics.crs.org a free website owned by CRS to get key partnership and capacity strengthening resources as well as MEAL and program related e-learning

- CRS Compass: www.compass.crs.org a website and contains a step-by-step guide and key action to effective manage the project from proposal development/design to the close-out

- USAID Free online course on health and M&E with certificate from John Hopkin University: https://www.globalhealthlearning.org/

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Short Quiz on project monitoring