



## LEARNING BASED MONITORING AND EVALUATION INTENSIVE

Facilitated by Dr Jess Dart  
5 ½ day intensive

### ABOUT THE TRAINING

Monitoring and Evaluation is an intrinsic part of the program cycle. In order to improve the work that we do, we need to look to see whether our program is achieving its intended results, and if not, we need to modify our actions. Monitoring and evaluation helps us to keep track of whether we are on track, and provides information to help us steer the program towards a desired direction. Of course, monitoring and evaluation also has a role outside the program cycle, and that concerns communicating the results to others.

### ABOUT THE CONTENT

The program begins with the basics of monitoring and evaluation and explores the relationship between this and adaptive management. Following an overview of the theory behind evaluation more generally, participants progress through a series of hands-on activities that allow them to apply the tools of learning-based monitoring and evaluation to their current work. Throughout this training, participants will be invited to develop a comprehensive MERI (monitoring, evaluation, reporting and improvement) plan for a topic of their choice.

At the end of the week participants will present this MERI plan and choose a step of MERI to implement over the next three months. Participants will be invited to re-group after 3 months and share their experiences of applying these concepts in the work place.

#### **Content:**

- Module 1: Introduction to Learning Based Evaluation
  - Module 2: Theory of Change
  - Module 3: Meaningful Monitoring and Most Significant Change technique
  - Module 4: Additional Evaluation Studies
  - Module 5: Reporting and Improvement
- Review: Presentation and review of work place projects 3 months after course

## MODULE 1: INTRODUCING LEARNING BASED MONITORING AND EVALUATION

Effective evaluation is critical to informed decision making. This module provides a broad introduction to monitoring and evaluation, reporting and improvement (MERI) and offers a set of practical steps for developing a MERI plan.

## MODULE 2: THEORY OF CHANGE

Theory of Change (sometimes called Program Logic) is a simplified model of expected cause-and-effect relationships between activities, immediate changes, intermediate outcomes and final outcomes. Theory of Change is best seen as a thinking tool that helps teams to consider how outcomes can best be achieved, articulate a clear narrative for the choice of interventions, and later to help monitor, evaluate and report on progress. This module introduces the Theory of Change concept and lays out a step by step process for creating a model.

## MODULE 3: MEANINGFUL MONITORING AND MOST SIGNIFICANT CHANGE

In this module participants will focus on how to manage for the ongoing collection of information that is meaningful to those delivering the program and collecting the data. Participants will also examine the basics of designing an internal, ongoing monitoring system and taste test a number of qualitative and quantitative methods of data collection including semi-structured interviews, focus groups, global assessment scaling, questionnaires and participant observation techniques.

The Most Significant Change (MSC) approach is a participatory process that compliments more conventional monitoring systems by tracking unexpected outcomes which leads to important benefits for organisational effectiveness. MSC is a qualitative, participatory process that involves the collection of 'stories' of change then includes all project stakeholders in deciding the sorts of change to be recorded.

## MODULE 4: STRATEGIC EVALUATION STUDIES

While many of the requirements of a learning-based evaluation plan may be met through comprehensive internal monitoring, sometimes we may need to conduct (or commission) additional evaluation studies. For example, sometimes we are required to have an external mid-term or final evaluation. This module focuses on evaluation questions, evaluation design and how to write the terms of reference for an externally conducted evaluation study.

## MODULE 5: REPORTING AND IMPROVEMENT

One of the big failings in monitoring and evaluation is that teams do not analyse and reflect on the information that is generated. In this module participants will gain a clear understanding of how to close the loop and use evaluative information to improve not only the program but also the evaluation framework itself. After examining effective reporting mechanisms the training program will conclude with a reflective session on managing change, optimal decision making and how this leads to continuous improvement through informed decision making.