ACTION
EDUCATION

MONITORING & EVALUATION
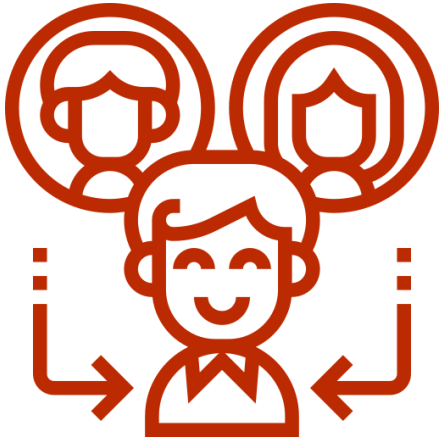
EXPERIENTIAL
TRAINING

INTRODUCTION & TRAINING ORGANISATION

YOUR FACILITATORS

This training session will be led by :

- Sokly LIM, Head of MEAL, Cambodia

- Pauline GAUCHE, Program Manager, Cambodia

This course was designed by :

- Valerie

- Pilar

- Geoffrey

Training - experimentation, based on your tools and realities in the field.

Your feedback will be used to fine-tune the processes, tools and challenges of the new monitoring-evaluation system.

LET'S INTRODUCE OURSELVES

Introduce yourself. Answer the following questions:

- Who are you?

- Which position and which country?

- What significant experience(s) do you have in Monitoring & Evaluation?

- Quickly present your specific expectations for the training.

YOUR EXPECTATIONS

You expressed:

- Report better on our project's Impact [for communication purpose].

- Learn the new MEAL plan.

- Get a better understanding on MEAL and its importance to support project implementation.

- Learn more about MEAL practices.

- Learn & share from other participants' experiences.

- In depth information on how to use tools for data collection, data analysis and how to apply the results/assessment into improving program implementation.

- There is always room for improvement, even for those who already have an extended background in M&E.

WHY THIS COURSE?

List 5 reasons why this training is important for you, for your teams, for your partners, for the organization?

You have 10 minutes to exchange.

YOUR REASONS

You expressed:

- We need a **common understanding** among our teams internally.

- Then we can **share that common understanding with our implementing partners**: *how to set up theory of change, indicators and their definitions, etc.*

- Help us know why we are doing what we are doing? to r**ealise our goals and how to get there.**

- Important for **Communication** to better use data evidence, to report to donors through story-telling, to improve coordination with M&E and Management teams.

- M&E is really important for **program management**: to identify quickly and early any issues and be able to answer it in a timely manner

TRAINING OBJECTIVES & EXPECTATIONS

This training aims to:

- Share a common vision of Monitoring and Evaluation (M&E) at ACTEI

- Ensure basic knowledge of monitoring and evaluation for ACTEI's operational teams

- Strengthen the skills and capacities of ACTEI teams to implement a Monitoring & Evaluation system

- Contribute to the adoption of harmonized and common M&E tools at ACTEI

- Gradually support the deployment of M&E

At the end of the course, participants should be able to:

- Apply basic knowledge of the monitoring-evaluation system, in line with the ACTEI monitoring-evaluation policy

- Integrating M&E into a project cycle management approach

- Design and implement key M&E tools - Indicators, M&E Plan, data collection and analysis tools, evaluation, etc.

HOW IS THIS TRAINING ORGANIZED?

Format:

- Mixed training:

  - ○ 6 group sessions (3h)

  - ○ 5 individual work between sessions (at your own pace) (2h)

COURSE

- **Module 1 - Group Session - Introduction to MEAL**
  - Individual work (+/- 1h of work) - What are the needs in monitoring and evaluation for my project?

- **Module 2 - Group Session - Preparation phase**
  - Individual work (2h of work) - Prepare the M&E plan

- **Module 3 - Group Session - Implementation phase - Project launch**
  - Individual work (2h of work) - Setting up the Dashboard

- **Module 4 - Group Session - Implementation phase - Data collection**

- **Module 5 - Group Session - Implementation phase - Analysis**
  - Individual work (2h of work) - Using the dashboard - Analysis

- **Module 6 - Group Session - Transition and Closing phase**
  - Individual work (2h of work) - End of training - test

MODULE 1.
INTRODUCTION TO MEAL

AGENDA

I. MEAL's interest for ACTEI

II. Introduction to MEAL

III. Issues surrounding MEAL

IV. The project cycle and MEAL

PEDAGOGICAL OBJECTIVES - MODULE 1

At the end of this module, participants should be able to :

- Identify the benefits of a MEAL policy for project teams and international management

- List the components of a MEAL system and their definitions.

- Understand the main concepts and issues surrounding MEAL

- Identify M&E processes, milestones and tools for project management.

I. MEAL' INTEREST FOR ACTEI

MODULE 1

WHY A MEAL POLICY?

Identify why it is necessary to have a MEAL policy specific to your organization - objectives?

You have 10 minutes to exchange.

WHY A MEAL POLICY?

As part of our operational management, we are committed to **transparent decision-making and accountability** to the people we serve, as well as to our partners and donors of all kinds.

Harmonize our practices and capitalize on our know-how, to **maximize the impact of our educational interventions**.

Drawing on the lessons learned from our operations and the standards of the international solidarity sector, to **guarantee the quality, effectiveness and impact of our actions.**

Formalize the organization's commitments to anchor the MEAL culture within the organization's teams and stakeholders.

This policy affirms the mandatory nature of Action Education's Monitoring & Evaluation system. **This system is mandatory for all** projects, and replaces processes and tools that may have been developed by regions and/or countries.

WHY A MEAL POLICY?

In short, the policy aims to :

- Provide an organization-wide MEAL reference framework

- Display strategic orientations, guiding principles and key references for ACTEI

- Define the MEAL institutional framework by presenting the minimum MEAL requirements for all ACTEI projects.

- Develop and strengthen the MEAL culture and the use of information and knowledge for evidence-based decision-making at all levels.

- Promote continuous learning and innovation based on the analysis of our operational practices and results.

- Strengthen commitment to MEAL functions at all levels of the organization

II. INTRODUCTION TO MEAL

MODULE 1

MEAL - DEFINITIONS

Monitoring

Evaluation

Accountability

Learning

MEAL - DEFINITIONS

1. Find the definition :
MONITORING and LEARNING
2. List Who - Why - When (in the project cycle)

1. Find the definition :
EVALUATION AND ACCOUNTABILITY
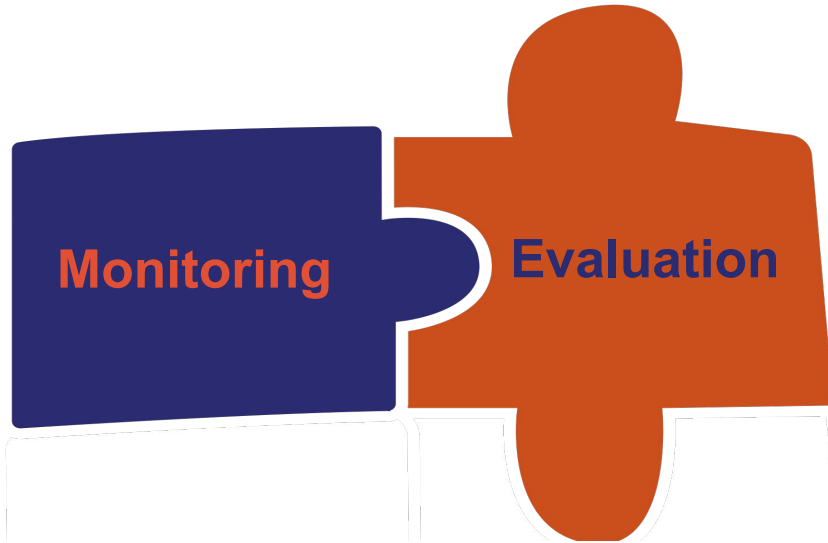2. List Who - Why - hen (in the project cycle)

You have 10 minutes to exchange.

MEAL - YOUR DEFINITIONS

MONITORING	EVALUATION	ACCOUNTABILITY	LEARNING
When?			
From the beginning to the end of the project	One time: baseline / mid-term /final		
By whom?			
Conduct by internal team: program team, sometimes Head Office	Internal/External	Everyone is involved	
Why?			
To identify any issues or needs, challenges at an early stage to we can provide appropriate solution on time. we know better how we can support the field implementation	Measure the results, assess the impact of the project

Provide a benchmark to assess if you have achieved what you aimed to in that time, to move forward accordingly Measure if our project remains relevant to address the identified problem / Assess the effectiveness of the project (cost-effectiveness, etc) | Accountability to other stakeholders (beneficiaries, donors, governments...)

It's our commitment and obligation to conduct impactful and efficient actions for the people we support | Identify our lessons learned, what are the ingredients of success or failures > to adapt our management further: promote or scale up the success factors while mitigating the failure factors |

MEAL - DEFINITIONS

Action Education defines **evaluation** as an in-depth examination of a project/program or policy, covering its design, implementation, outcomes and impact, in order to determine the effectiveness and sustainability of interventions. Evaluation involves the analysis of qualitative and quantitative data, and incorporates feedback from key stakeholders.

Monitoring

Evaluation

Action Education defines **monitoring** as a regular and continuous process of collecting and analyzing data on project/program activities and results. This includes feedback from stakeholders, in order to provide relevant information on the state of progress, progress in achieving results, and the quality of technical approaches and partnership relations. Monitoring also makes it possible to measure the state of budget consumption and the proper use of earmarked and non-earmarked funding.

MEAL - DEFINITIONS

Learning

Accountability

Action Education defines **learning** as a continuous process of critical reflection, adaptation and improvement of knowledge, attitudes, skills and practices, based on data collected as part of monitoring and evaluation, as well as the experience and knowledge of those involved. Learning aims to improve the design, implementation and results of projects/programs on the basis of feedback and evidence.

Action Education defines **accountability** as the responsibility to ensure that work is carried out in accordance with agreed rules and standards, and to report clearly and accurately on progress, performance and results against the initial defined framework. It is also the responsibility to ensure that interventions are carried out in an ethical, transparent and participatory manner, with the involvement of communities and other stakeholders.

Action Education is committed to being accountable to its target groups, partners, government authorities, donors and the general public. MEAL's systems must, as a minimum, include a feedback mechanism to collect the opinions of supported populations, partners and relevant stakeholders on our interventions, as well as an information system on the results of our programs to enable adaptation and continuous improvement.

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MEAL - DEFINITIONS

MONITORING	EVALUATION	ACCOUNTABILITY	LEARNING
When?			
Continuous / permanent during the project	Periodic (ex-ante, intermediate, final)	Continuous / permanent during the project	Periodic (start of project/ implementation/ end of project)
By whom?			
Internally, by those responsible for project implementation	Internal or external or mixed	Internally, by those responsible for project implementation	Internal or external or mixed
Why?			
Steering the project, assessing progress, informing decision-making, taking corrective action, updating the project action plan, facilitating reporting	Evaluate progress and its quality, draw lessons and recommendations, report, redirect the project	Accountability to stakeholders and responsible exercise of power, corrective action.	Learning from experience and improving activities, combating the evaporation of experience, taking part in collective construction

15' BREAK

III. ISSUES SURROUNDING MEAL

MODULE 1

MEAL AND QUALITY

1. What is a Quality project for ACTEI?
2. Think about how MEAL facilitates quality

You have 10 minutes to exchange.

YOUR DISCUSSION

Your thoughts on MEAL Quality:

- Using the tracking results monitoring, and evaluation to adapt and facilitate the improvement of project activities design.

- By tracking the challenges, and results, we know better what work and what doesn't, so then we able to improve our approach and implementation.

- We need to make sure our project don't "just"deliver, but deliver well in an effective and relevant manner.

- Also facilitate to identify how we can invest smarter in the future.

- **Specific Case**: a Community Radio project to broadcast education & health messages to parents. After 2 years of implementation, MEAL data collection and analysis enabled the program team to understand how to improve the reach, by identifying the key way for the people in the community to receive the information: using community speakers which are already available in communities to spread public announcements. The program team was then enable to change the way of delivery for a greater impact, improving the quality of the project.

MEAL AND QUALITY

Quality is contextual - it is determined by stakeholders:

quality is the set of elements and characteristics of humanitarian assistance that support its ability to respond, on time, to expressed or implicit needs and expectations, while respecting the dignitý of the populations it aims to help. (Source : CHS - URD)

Context	Challenges	Stakeholders
Quality, efficiency, and accountability are context-specific — they depend on the different expectations of stakeholders.	The main challenge lies in identifying the various stakeholders in a specific context and taking their specific expectations into account in a balanced way.	Any person or entity can have an impact on and/or be affected by an organization, a strategy, or a project (CHS).

MEAL AND QUALITY

MEAL :

"Enables progress to be monitored, programmatic adjustments to be made, unforeseen effects of programs to be discovered, their impact to be judged, full responsibility and accountability for their execution to be taken, and experiences to be learned from in a logic of continuous improvement."

(Source: CRF)

Monitoring

Evaluation

Feedback and answers

Decision-making Adaptation

Results and transparency

Institutional Knowledge

Accountability   Learning
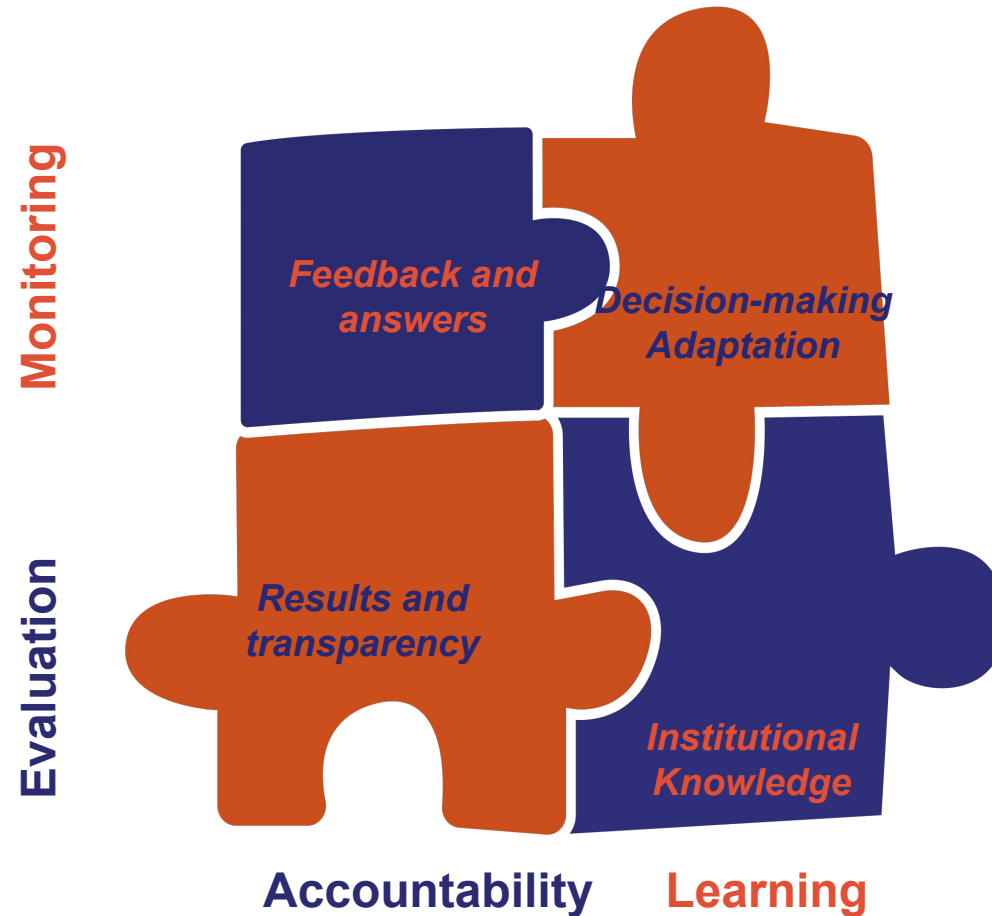
OTHER ISSUES SURROUNDING MEAL

OPERATIONALIZATION

INFORMATION MANAGEMENT (MIS)

DATA COLLECTION

OPERATIONALIZATION OF MEAL

Operationalization

MEAL actions should help put quality and accountability commitments into practice at field level.

- MEAL Activities
  - Budget
  - Calendar
  - Responsibilities

- Team and partner capabilities

MEAL & INFORMATION MANAGEMENT

What's the link between MIS and MEAL?

The Management Information System (MIS) will serve as a **framework for developing MEAL activities.**

As such, MEAL activities must be taken into account when developing the MIS, as they will have an impact on MIS processes and responsibilities (among other aspects).

A joint MIS could be developed with partners, as in the case of multi-partner projects - it could facilitate the development of MEAL activities since information and exchanges between the various players involved in the project will be pre-identified.

BUT - It's important to take into account each partner's specific constraints and existing processes.

MEAL AND DATA COLLECTION

Each MEAL component has :

- Collection tools to be developed.

- Data collection processes to be respected.

- Data to be collected, analyzed and used for decision-making.

Participants' inputs:

● To ensure data quality, there are 5 data quality principles: **validity, integrity, precision, reliability,** and **timeliness.**

IV. THE PROJECT CYCLE AND MEAL

MODULE 1

THE PROJECT CYCLE AND MEAL

HOW DOES MEAL FITS INTO THE PROJECT CYCLE?
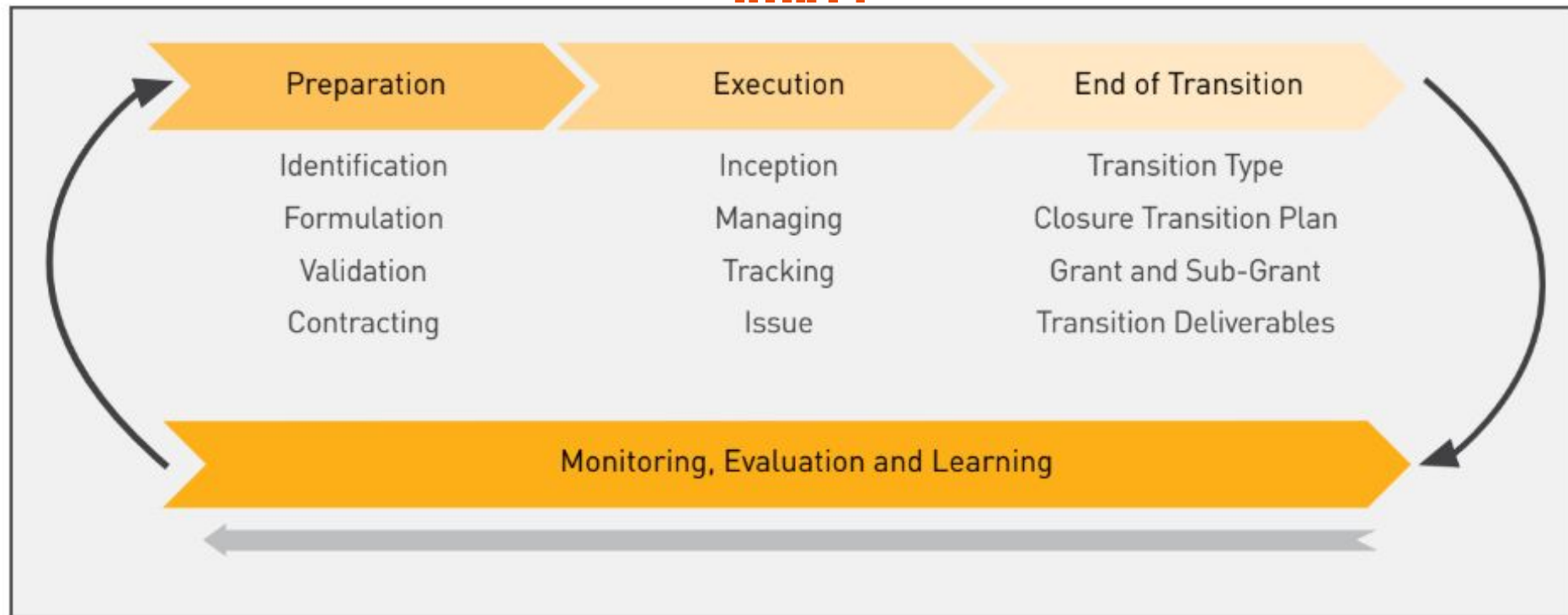
Figure 3: Programme Lifecycle with AEA

M&E IN THE PROJECT CYCLE

LET'S DISCUSS & LIST THE ACTIVITIES AND TOOLS FOR EACH STAGE

| PREPARATION PHASE | IMPLEMENTATION PHASE | CLOSING/ TRANSITION PHASE |

You have 10 minutes to exchange.

YOUR DISCUSSION

Preparation Phase:

- Activities: Identify the needs, data collection, evidence

- Tools: Baseline study, theory of change, logframe, define indicators, identify source of verifications…

Implementation Phase:

- Activities: Track the progress, detailed work plan, activities

- Tools: Indicators, trackers, monitoring and tracking system, mid-term review…

Closing/Transition Phase:

- Activities: Learn lessons, assess the impact

- Tools: Final Evaluation

THE PREPARATION PHASE

PREPARATION

ASSESSMENT AND NEEDS ANALYSIS ⇢ **EVALUATION TOOLS**

LOGICAL FRAMEWORK / CHOICE OF INDICATORS ⇢ **INDICATOR BANK**

FIRST VERSION OF THE M&E PLAN ⇢ **M&E PLAN template**

BUDGETING FOR M&E SYSTEM ⇢ **M&E BUDGET**
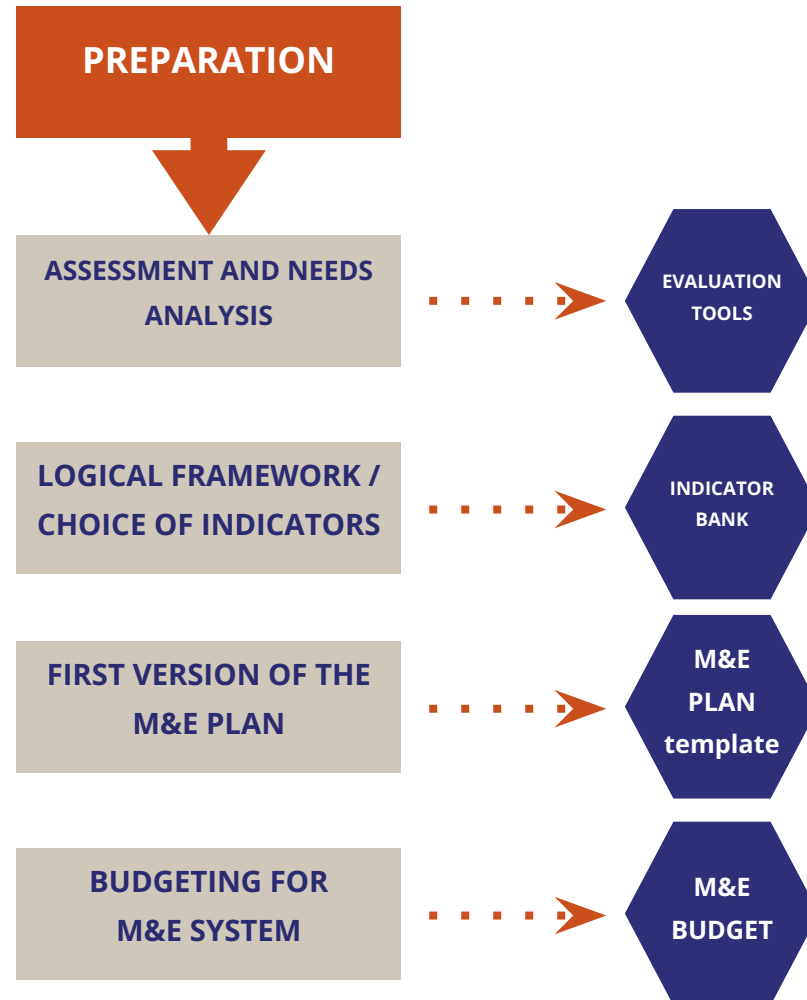
THE PREPARATION PHASE

Every project must define its logical framework and measure it at least during the course of the project:

- 1 effect indicator, to monitor the changes expected as a result of the intervention

- Qualitative and quantitative indicators for objectives and expected results

- 1 accountability indicator, linked to the satisfaction of beneficiaries and stakeholders

THE IMPLEMENTATION PHASE

INCEPTION

- BUDGETED OPERATIONAL PROJECT PLANNING MEETING AND PRESENTATION OF THE M&E → OPERATING PLAN OUTLINE
- FINALIZING THE M&E PLAN → M&E PLAN template
- DEFINITION OF ROLES AND RESPONSIBILITIES IN M&E (RACI) → RACI M&E PLAN
- DEFINITION OF COLLECTION TOOLS AND VERIFICATION SOURCES (SOV)
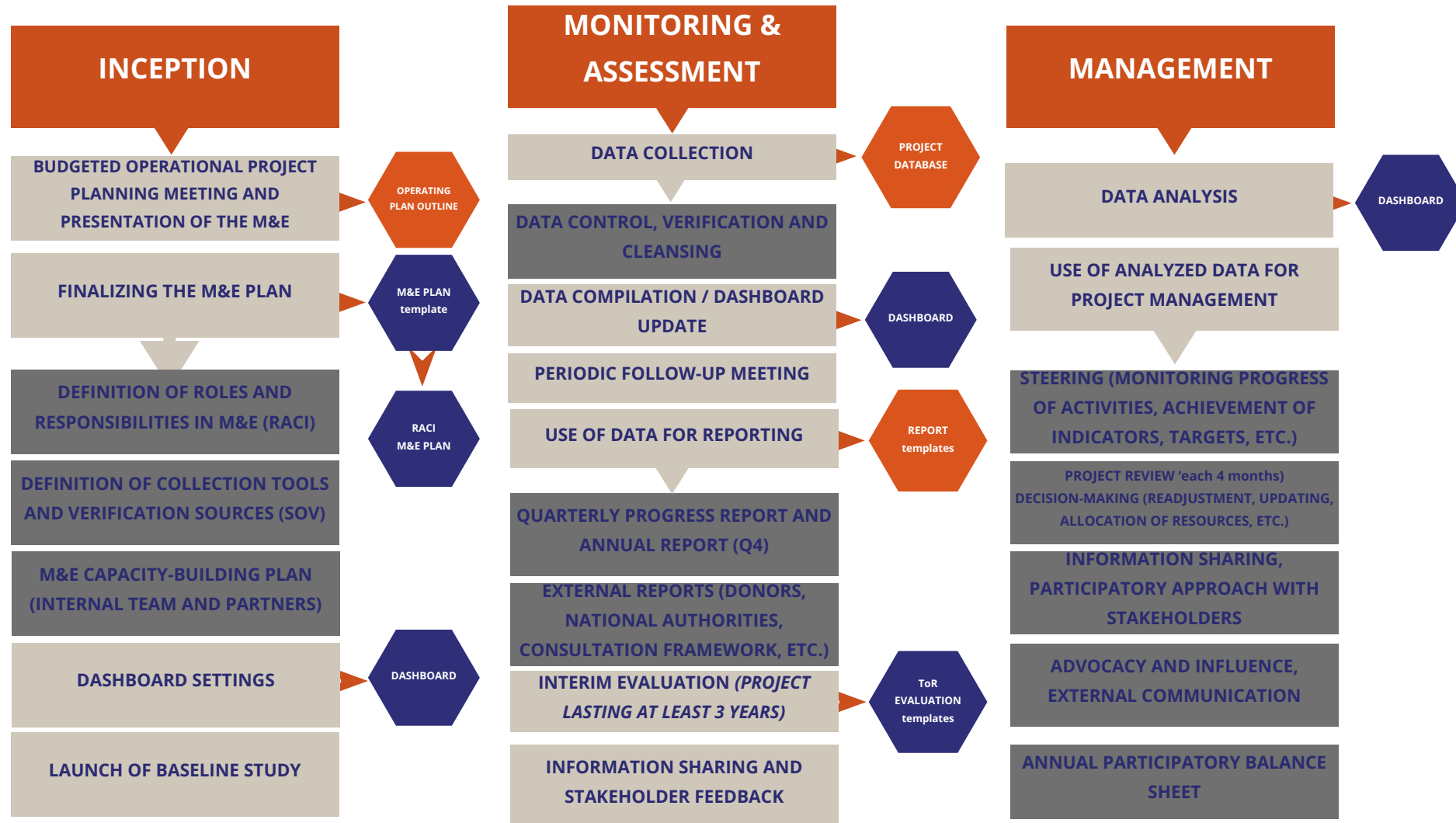- M&E CAPACITY-BUILDING PLAN (INTERNAL TEAM AND PARTNERS)
- DASHBOARD SETTINGS → DASHBOARD
- LAUNCH OF BASELINE STUDY

MONITORING & ASSESSMENT

- DATA COLLECTION → PROJECT DATABASE
- DATA CONTROL, VERIFICATION AND CLEANSING
- DATA COMPILATION / DASHBOARD UPDATE → DASHBOARD
- PERIODIC FOLLOW-UP MEETING
- USE OF DATA FOR REPORTING → REPORT templates
- QUARTERLY PROGRESS REPORT AND ANNUAL REPORT (Q4)
- EXTERNAL REPORTS (DONORS, NATIONAL AUTHORITIES, CONSULTATION FRAMEWORK, ETC.)
- INTERIM EVALUATION *(PROJECT LASTING AT LEAST 3 YEARS)* → ToR EVALUATION templates
- INFORMATION SHARING AND STAKEHOLDER FEEDBACK

MANAGEMENT

- DATA ANALYSIS → DASHBOARD
- USE OF ANALYZED DATA FOR PROJECT MANAGEMENT
- STEERING (MONITORING PROGRESS OF ACTIVITIES, ACHIEVEMENT OF INDICATORS, TARGETS, ETC.)
- PROJECT REVIEW 'each 4 months) DECISION-MAKING (READJUSTMENT, UPDATING, ALLOCATION OF RESOURCES, ETC.)
- INFORMATION SHARING, PARTICIPATORY APPROACH WITH STAKEHOLDERS
- ADVOCACY AND INFLUENCE, EXTERNAL COMMUNICATION
- ANNUAL PARTICIPATORY BALANCE SHEET

THE IMPLEMENTATION PHASE

INCEPTION

- All projects must include an induction phase lasting between 1 and 3 months, depending on the duration of the project.

- This induction phase should make it possible to carry out the necessary recruitments if they could not be anticipated;

- Define project management tools and organize an inclusive launch phase with project stakeholders to allow detailed planning of activity implementation and project monitoring, evaluation and learning procedures.

THE IMPLEMENTATION PHASE

MONITORING & ASSESSMENT

- All projects/programs must hold regular interdepartmental (project/support) project reviews (at least every 4 months, and necessarily aligned with the budget preparation and review cycle) to analyze and record the latest project information, identify areas of concern, and decide on any necessary changes.

- Every month, the project/program manager and a member of the finance team review progress on the basis of operational and budgetary monitoring tools.

- All projects must deploy feedback and complaint mechanisms specific to their areas of intervention, in line with Action Education's protection and safeguarding policy.

THE CLOSING / TRANSITION PHASE

MONITORING

DASHBOARD FINALIZATION (LAST UPDATE BEFORE ARCHIVING) → DASHBOARD

INTERNAL FINAL REPORTS → INTERNAL REPORT templates

EXTERNAL FINAL REPORTS → EXTERNAL REPORT templates

DEPOSIT FILES IN DEDICATED DRIVE / ARCHIVE

EVALUATION

FINAL INTERNAL OR EXTERNAL EVALUATION → M&E GUIDE EVALUATION

DEFINING EVALUATION QUESTIONS AND FORMULATING ToRS → ToR EVALUATION template

CALL for CONSULTANTS FOR EXTERNAL EVALUATIONS → INTERNAL CALL PROCESSES

CONDUCTING THE EVALUATION DATA COLLECTION

FINAL EVALUATION REPORT → EXTERNAL REPORT template

FEEDBACK TO ALL STAKEHOLDERS

M&E LEARNING

LEARNING ABOUT PROJECT M&E → M&E QUESTIONNAIRE

THE CLOSING / TRANSITION PHASE

- All projects must include a final evaluation, at least
  - internal for projects less than 2 years old and
  - external for projects more than 2 years old (subject to donor requirements).

- All projects must formalize and share the lessons learned from experience, so that they can be taken into account in subsequent interventions.

TO REMEMBER

KEY MESSAGES S1
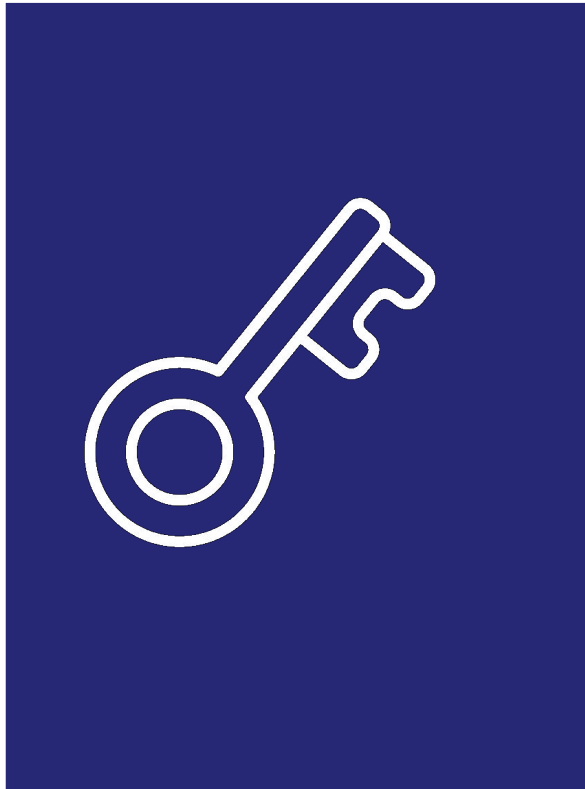
The M&E policy and system applies to all projects, replacing processes and tools that may have been developed by regions and/or countries.

MEAL and its tools and procedures contribute to the quality of our actions through informed decision-making.
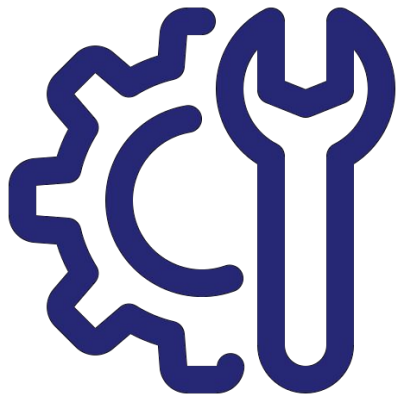
ACTEI's MEAL policy sets out the MEAL institutional framework and the minimum MEAL requirements for all ACTEI projects at each stage of the project cycle.

INSTRUCTIONS INDIVIDUAL WORK
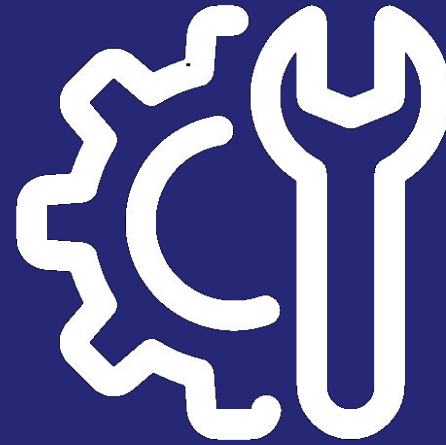
MODULE 1

ACTION
EDUCATION

1. Think individually about your project and your specific monitoring and evaluation needs.

2. In the forum, write down and list the activities and tools that you have identified as missing from your project. Be sure to make a list for each component. One list for "Monitoring" and one list for "Evaluation."

3. Prepare to present during our next session on Thursday 19th August.

MOODLE PLATFORM

Log in:

- Go to: https://learning.action-education.org/course/view.php?id=177

- Login [on the top right corner]:

  - Username: family name + first letter of the first name in small letters *[example: Pauline Gauche =* ***gauchep***

  - Password: **Aideetact1** *[if you want, you can change the password on the Moodle website]*

Find all resources :

- You can download the PPT or any other resources documents we might add

MOODLE PLATFORM

Complete your Assignments:

- Complete and/or upload your assignments directly on the related Module.

- How to post your work?

  ○ Go to the related Module & Forum/Assignment section *[Module 1: "What are the monitoring and evaluation needs for my project?"]*

  ○ Here's how to do it:
    1. Click on the button 'Add a discussion topic'.
    2. In the subject line, write **the name of your project**.
       a. Cambodia > **CCOSC**
       b. Laos > **?**
    3. Write your work directly in the message
    4. If you want to upload a file (Word, ppt, pdf, etc.), click on 'Advanced' below the message. This will open an "attachment" box below the message where you can drag and drop your file into the space with the arrow.
    5. Click on the 'Send' button to post your work in the forum.

CLOSING MODULE 1

WHAT WORKS

WHAT NEEDS TO CHANGE

THEME TO BE CLARIFIED?
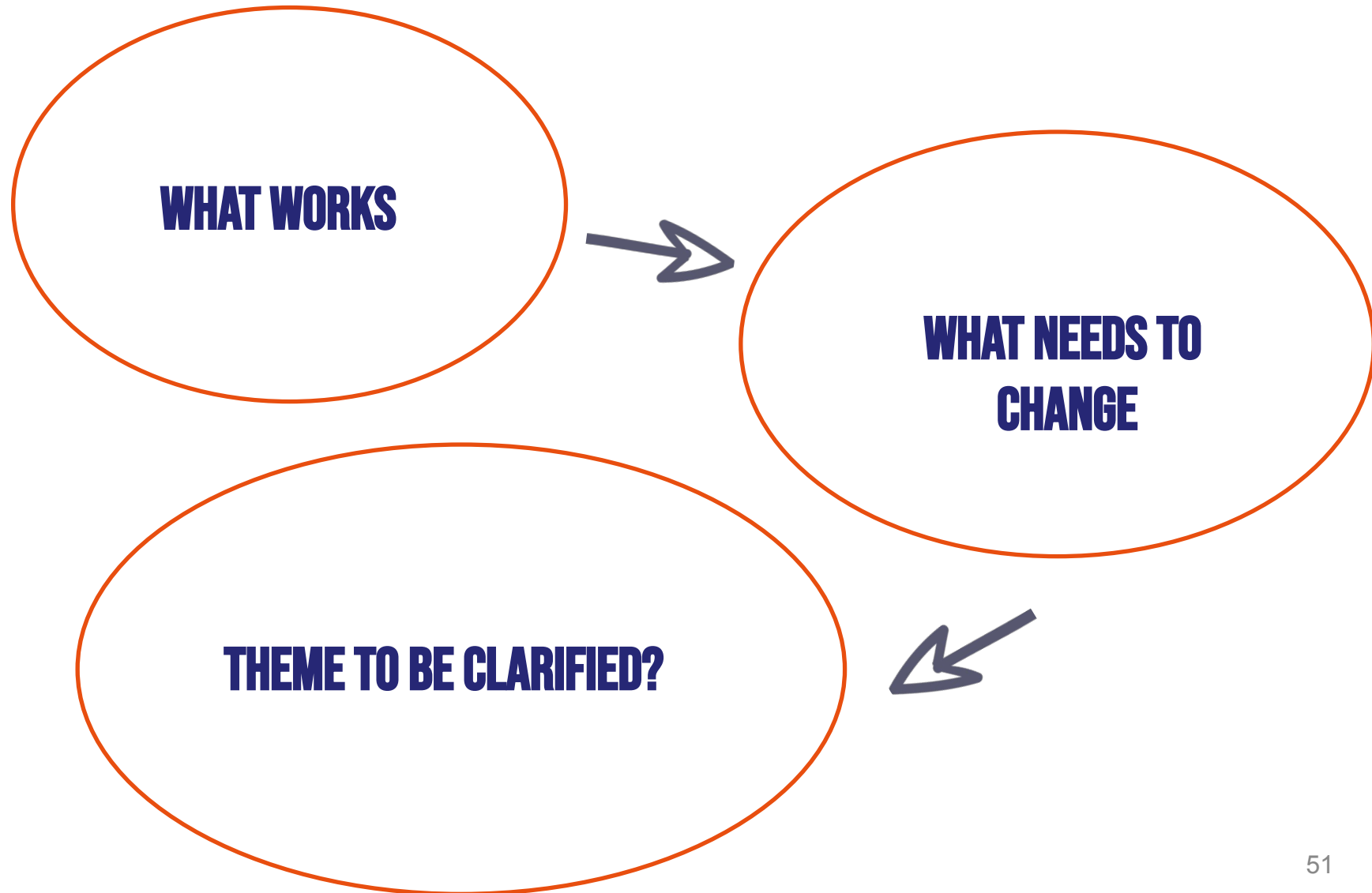
MODULE 1 FEEDBACK

Participants' Feedback:

- Explore other platforms like Zoom to be able to use Breaking Rooms tool.

END OF MODULE 1
THANK YOU!

MODULE 1

ACTION EDUCATION