

**Monitoring & Evaluation Plan**

**{PROJECT TITLE}**

**{COUNTRY}**

*Version [N°] completed on [DATE] by [NAME/LAST NAME].*

*The project's M&E plan is in line with the framework set by Action Education's international direction, and in particular with the MEAL policy and international norms and standards such as CHS, OECD DAC criteria and SPHERE standards.*

*This document must be completed for ALL projects. For all stages, the key lies in the collective reflection process. You need to organize an inclusive process and choose participatory methods to complete this document.*

*Monitoring and evaluation has a cost. That's why we recommend setting aside at least 3% of project costs for the Monitoring & Evaluation System.*

*Modification rules: The M&E plan is a living document that can be updated throughout the project cycle. Each modification to the M&E plan must be documented and shared with all relevant project stakeholders. The document version is updated on the cover page.*

Table of contents

**Table of contents**

[**1. Project features 4**](#_o18g4nlmsskr)

[1.1 Project description 4](#_3fgh13hkfk3y)

[1.2 M&E system objectives 4](#_a7b8njp0pjtu)

[1.3 Information needs of project M&E stakeholders 4](#_7jyzwqlk6mqk)

[**2. Resources available for project M&E 5**](#_orn34fa6b81l)

[2.1 M&E financial resources 5](#_bx41ra60amfc)

[2.2 M&E human resources 5](#_8onc449uqgml)

[2.2.1 ACTEI team 6](#_we3dp561hnbt)

[2.2.2 Operational partners involved 6](#_5razsiu3n05y)

[2.2.3 Diagnosis of capacity-building needs 6](#_iun3mcr05743)

[2.2.4 Capacity building planning 6](#_5ca2xqc7uw51)

[2.3 Organization of the steering committee provided for 7](#_bpi8j9pf4a9u)

[**3. Description of the M&E System 7**](#_shvj9jdgyydg)

[3.1 Monitoring scope 7](#_snxvtkfa9q0f)

[3.2 Scope of evaluation 8](#_2sxuankmro2l)

[3.3 Description of monitoring action plan 9](#_r1fkci2kymqw)

[3.3.1 Monitoring requirements of institutional or private lessors : 9](#_mnkv2fimq9we)

[3.3.2 Main stages and roles and responsibilities 9](#_x4jekytkvfst)

[3.4 Description of evaluation action plan 10](#_bv7zyzn5mxjm)

[3.4.1 Evaluation requirements of institutional and/or private backers : 10](#_7naqgbbo9kn5)

[3.4.2 Main stages and roles and responsibilities 10](#_4vrqa1n44yyv)

[**4. Planning and organization of collection and analysis 12**](#_9e9o4mcwx23k)

[4.1 Presentation of indicators - M&E plan 12](#_xtd8jz2mkqva)

[4.2 Monitoring project activities 12](#_wrwghkr8e1jo)

[4.3 Information management 12](#_ewajjuhgqsk0)

[4.4 Do No Harm in data collection - data protection. 12](#_i691o2gbp7iv)

[4.5 Analyze data 13](#_b34femk762qg)

# Project features

## Project description

*Add link to Tab 1 shared drive dashboard*

## M&E system objectives

*Recall the overall objectives of the project's M&E system for all stakeholders, highlighting the links between monitoring and evaluation.*

| **Purposes of an M&E System in general**  | **M&E objectives defined for the**  |
| --- | --- |
| Improving management and efficiency |  |
| A common understanding shared by all stakeholders  |  |
| Reporting and communication  |  |
| Capitalize and learn |  |

## Information needs of project M&E stakeholders

*Specifying the information needs of all project partners helps to ensure the relevance of the data collected for project monitoring and evaluation. The table below presents three categories of recipients: (Steering bodies, Institutional players, Implementation partners).*

*Source: Workshop/exchanges with project stakeholders - project budgeted operational planning meeting and presentation of M&E plan*

| Types of stakeholders in your project | Project expectations | M&E expectations | Source of information *(reports, dashboards, meetings, etc.)* |
| --- | --- | --- | --- |
| ACTEI project team |  |  |  |
| Country Manager |  |  |  |
| Partners |  |  |  |
| Authorities.... |  |  |  |

*Complete the stakeholder types and add as many lines as necessary, depending on your project and context.*

# Resources available for project M&E

## M&E financial resources

*Insert validated M&E budget or M&E-related budget lines or specify, if relevant, the planned budget (as a % of the overall budget) for M&E activities, deployment in terms of HR, equipment and capacity building.*

*Support: project budget.*

*Examples of M&E costs: human resources costs (allocated time and training); technical & support costs (tablet, software, paper, printing...); travel costs for information gathering; focus group organization costs; translator costs; per diem for resource persons; collective workshop costs....*

**Cost and feasibility table**

| Activities | How it works | Unit | Quantity | CU | Amount  |
| --- | --- | --- | --- | --- | --- |
| **START-UP PHASE** |
| Acquire equipment/software... |  |  |  |  |  |
| Training device users |  |  |  |  |  |
| Develop implementation/parameterization tools |  |  |  |  |  |
| Baseline study |  |  |  |  |  |
| **IMPLEMENTATION PHASE** |
| Data collection (throughout the project) |  |  |  |  |  |
| Data compilation / Dashboard update |  |  |  |  |  |
| Data analysis  |  |  |  |  |  |
| Use of data (reporting, advocacy, communication, etc.) |  |  |  |  |  |
| Feedback to stakeholders |  |  |  |  |  |
| Mid-term evaluation |  |  |  |  |  |
| **TRANSITION & CLOSING PHASE** |
| Final project evaluation |  |  |  |  |  |
| Report and final information |  |  |  |  |  |

*Complete the activities and add as many lines as necessary according to your project and context.*

## M&E human resources

*Identify the people to be made responsible. Record the human resources allocated to the project (at headquarters and in the field) for the various phases of the project. M&E organization chart if relevant.*

*Specify the roles and responsibilities of the teams in charge of the system.*

*In the case of a consortium, specify if there are any specific roles and responsibilities for the lead and how it works with the implementing partners.*

### 2.2.1 ACTEI team

*What human resources are available within the ACTEI team: project manager, M&E officer if available, facilitator or other person who can contribute to data collection... Write down in a few lines, or bullet point format, the people in the team who are available and mobilized for M&E.*

### 2.2.2 Operational partners involved

*What human resources are available to partners to implement M&E? Write down in a few lines, or bullet point format, the people on the partners' teams who are available and mobilized for M&E.*

### 2.2.3 Diagnosis of capacity-building needs

*Analyze the needs of the project teams involved, both within ACTEI and with partners: understanding M&E, data collection, data analysis, use of data, use of tools (excel, method...).*

Examples: experienced team member, excel expertise and skills, data collection skills....

Junior profile, need for capacity building in......

### 2.2.4 Capacity building planning

*Complete the table below to plan any capacity-building actions.*

| Subject of capacity building | Pedagogical objectives | For whom (target audience) | By whom (internally, externally, etc.)? | When? | Course duration |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Organization of the steering committee provided for

*Analyze the project management organization and determine its consistency with the M&E management system. Draw up an organization chart.*

*Source: Workshop/exchanges with project stakeholders. - Project budgeted operational planning meeting and presentation of SE plan*

# Description of the M&E System

## Monitoring scope

*Determining the purpose and scope of M&E was an exercise in which stakeholders answered the following questions: What are the results and objectives to be monitored (cf. logical framework)/What questions will M&E need to answer?/What intermediate results will M&E need to address? What are the indicators, signals or progress markers?*

| **Follow-up questions and "intermediate results** |
| --- |
| *Steering questions* |
| Are activities progressing according to plan? Are targets being met? ..... |
|  |
|  |
|  |
| *Quality of activities and services* |
|  |
|  |
|  |
| *Stakeholder satisfaction questions* |
|  |
|  |
|  |
| *Questions about achieving results,* effects.... |
|  |
| *Learning issues (best practices...)* |
|  |
|  |

*Complete the table and formulate your own questions, adding as many lines and types of questions as you need.*

## Scope of evaluation

*Determining the purpose and scope of the evaluation was an exercise in which stakeholders answered the following questions: What are the results and objectives to be evaluated (cf. logical framework)/What questions will the evaluation need to answer?/What intermediate results will the evaluation need to address?*

*Questions can be organized according to evaluation criteria: OECD criteria: coherence, relevance, effectiveness, efficiency, impact, sustainability, etc.*

*Other evaluation criteria: partnership relations, participatory approach, cooperation, empowerment/appropriation....*

| Mid-term evaluation questions (if relevant) |
| --- |
| Criteria |
|  |
|  |
|  |

| Final evaluation questions |
| --- |
| Criteria |
|  |
|  |
|  |

*Complete the table and formulate your own questions, adding as many lines and types of questions as you need.*

## Description of monitoring action plan

### 3.3.1 Monitoring requirements of institutional or private lessors :

*Integrate donor requirements in terms of reporting and monitoring activities (reporting date/period/donor indicator requirements, data disaggregation requirements, etc.).*

### 3.3.2 Main stages and roles and responsibilities

*Recall the various monitoring activities planned for project monitoring and steering, and the use of data collected through the various monitoring tools.*

Question guide for completing the table below :

* When are the data collection tools scheduled to be developed?
* If not, when do we need to carry out the study for the reference situation?
* when to collect data and when to analyze it
* To answer this question, a schedule needs to be drawn up. The easiest way is to think in retrospect ("retroplanning"), starting from the date when the analyzed data will be used.

| Stages / Activities | RACI | Period | Products/deliverables |
| --- | --- | --- | --- |
| *The steps listed here are indicative (based on the M&E steps) and should be adapted to your own specific needs and activities.* | Responsible | Accountable | Consulted | Informed |  |  |
| **START-UP PHASE** |  |
| Acquire equipment/software... |  |  |  |  |  |  |
| Training device users |  |  |  |  |  |  |
| Develop implementation/parameterization tools |  |  |  |  |  |  |
| Baseline study |  |  |  |  |  |  |
| **IMPLEMENTATION PHASE** |  |
| Data collection (throughout the project) |  |  |  |  |  |  |
| Data compilation / Dashboard update |  |  |  |  |  |  |
| Data analysis  |  |  |  |  |  |  |
| Use of data (reporting, advocacy, communication, etc.) |  |  |  |  |  |  |
| Feedback to stakeholders |  |  |  |  |  |  |
| **TRANSITION & CLOSING PHASE** |  |
| M&E evaluation |  |  |  |  |  |  |

*Complete the table and formulate your own activities, adding as many lines and types of questions as you need.*

## Description of evaluation action plan

### 3.4.1 Evaluation requirements of institutional and/or private backers :

*Integrate donor requirements in terms of evaluation: mid-term evaluation, final evaluation, deadline for final evaluation, external evaluation, mandatory evaluation criteria.....*

### 3.4.2 Main stages and roles and responsibilities

*Define and present the various evaluations planned for the project (intermediate, final, internal, external, joint, quality evaluations). Specify the involvement of the various stakeholders in carrying out the evaluations (community consultation-type methodology, focus group discussions, interviews, etc.).*

*Specify how assessment results and recommendations are to be shared with the various stakeholders.*

| Type of evaluation *(formative, change-oriented, effects/impacts, OECD criteria, self-evaluation, etc.)* | Internal/External | Composition of the Evaluation Committee | Estimated dates | Consultant profile |
| --- | --- | --- | --- | --- |
| *Mid-term evaluation* | *internal*  |  |  |  |
| *Final assessment*  |  |  |  |  |
|  |  |  |  |  |

| Steps  | RACI | Period | Products/deliverables |
| --- | --- | --- | --- |
| *The steps listed here are indicative (based on the M&E steps) and should be adapted to your own specific needs and activities.* | Responsible | Accountable | Consulted | Informed |  |  |
| Definition of evaluation questions |  |  |  |  |  | Evaluation matrix |
| Formulating ToRs |  |  |  |  |  | Terms of reference |
| If external evaluation : Publication of invitation to tenderSelection of consultant(s)Contract with consultant(s) |  |  |  |  |  | Selection criteriaService contract |
| Conducting the assessmentData collection |  |  |  |  |  |  |
| Collection analysis |  |  |  |  |  |  |
| Report writing |  |  |  |  |  | Draft report |
| Report proofreading/revision (proofreading committee for comments, corrections, etc.) |  |  |  |  |  | Commented reports |
| Report validation  |  |  |  |  |  | Final report |
| Report sharing |  |  |  |  |  |  |
| Restitution of the main conclusions |  |  |  |  |  | Support de restitution -document pour PP de synthèse |

# Planning and organization of collection and analysis

## Presentation of indicators - M&E plan

*This section is linked to the definition of each indicator. Reference should be made to the M&E plan included in tab 3.1 of the dashboard.*

*Add link to Tab 3.1 shared drive dashboard*

## Monitoring project activities

*Monitoring and evaluation contribute to the steering of project activities. It makes it possible to monitor progress and any difficulties encountered. A tab on the dashboard is dedicated to monitoring the project action plan.*

*Add link to Tab 2 shared drive dashboard*

## Information management

*Present the management of collected data: triangulation, quality assurance mechanism, procedure for integrating the various data into the monitoring system, data transmission and validation circuit, secure access and data protection, storage, archiving, etc.*

*Design a data flow diagram and responsibilities for large data flows and numerous players.*

*Tool path diagrams can help you contextualize your own information path. This involves specifying the stakeholders, in particular the project partners.*

## Do No Harm in data collection - data protection.

*Specify and explain the various aspects of the project concerning the Do No Harm approach for beneficiaries with regard to data collection (informed consent, etc.).*

*It is not necessary to include a long paragraph here, but to initiate a reflection within the team on the issues of data protection, anonymity and voluntary testimonials, and to define what the team wishes to put in place.*

## Analyze data

*In a few lines, specify the methods envisaged for data analysis, particularly in terms of participation with other stakeholders.*

*Here are a few questions to guide your thinking:*

*Interpreting the data collected*

* *schedule brainstorming sessions to refine the analysis of the data collected:*
* *who to invite*
* *what kind of upstream preparation is needed for greater efficiency when the time comes?*
* *Sometimes a first level of preparatory analysis can be carried out beforehand, to save the group time.*
* *clarify the objectives of this analysis work and what is expected of it in terms of both form and content*

*Developing decision-making tools*

* *1 or more dashboards, one or more graphs*
* *More comprehensive data in tabular form*