ACTION EDUCATION

MONITORING & EVALUATION

EXPERIENTIAL TRAINING

MODULE 4. MONITORING & EVALUATION

AGENDA

I. Learning review > Collective reminder of the dashboard's objectives

II. The challenges of setting dashboard parameters - Using and manipulating Excel

III. Data collection

PEDAGOGICAL OBJECTIVES - MODULE 4

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

- Finalize project dashboard settings
- Setting up and using the dashboard (Excel)
- Preparing your project dashboard
- Identify the M&E processes and tools to be used in the implementation phase
- Identify the basic elements of data collection

I. LEARNING REVIEW - REMINDER OF THE DASHBOARD'S OBJECTIVES

MODULE 4

YES

YOUR DASHBOARD - REVIEW

WHAT DO YOU THINK ARE THE OBJECTIVES AND USES OF THE DASHBOARD?

WHAT'S IT FOR?

- Opportunity to explore methodologies to collect & analyse the data
- Dashboard is really helpful, function as a roadmap for implementation and monitoring.
- Shows an overview of the project, with its progress, you can also quickly identify where to put your effort in.
- Quite easy and convenient to use by all team members, compared to usual raw data.

5 mins

Please, upload your documents on the Module before the Session

II. THE CHALLENGES OF SETTING DASHBOARD PARAMETERS

MODULE 4

ACTION EDUCATION

WHY DO I NEED TO SET PARAMETERS?

- Each project has its own specific challenges: dates, durations, themes, selection of indicators......
- So it's not possible to harmonize formulas upstream, because they wouldn't work for every project!
- To optimize use of the dashboard, certain formulas need to be configured.

Setting formulas will enable you to view analyses and balances in Tab 2 and automate all data calculations.

EXCEL PARAMETER-SETTING FUNCTIONS

WHAT CAN YOU DO IN EXCEL?

OVERVIEW OF KNOWLEDGE AND SKILLS

EXCEL PARAMETER-SETTING FUNCTIONS

What will you need to set up your dashboard?

Master basic calculations, functions and formulas: count; count.if; sums... ;	Extract and link data from different tabs	Setting up and modifying a diagram

EXERCISE - EXCEL FUNCTIONS

LET'S PRACTICE

In the dashboard - a few **formulas/functions** are already set up.
Can you find one and describe it to us?

- **Function type**: *(sum; count....)*
- **Ranges taken into account** by the formula: *(Row/column number)*
- As a project manager or M&E manager, **what does this mean to you**?

You have 10 mins.

BASIC FORMULAS AND FUNCTIONS

SUM

Adds data
=SUM(range)
=SUM(A5:L5)

COU

Counts a number of data
= COUNT(range)
=COUNT(A5:L5)

MULTIPLE CONDITIONS

=SUM.IF.ENS(1st criterion application range; "1st criterion";2nd criterion application range; "2nd criterion";calculation range)

=COUNT.IF.ENS(L1/P1; "Yes";L8:P8; "F";L10:P10)

SUM IF *(condition)*

=SUM.IF(criterion application range; "criterion";calculation range)
=SUM.IF(L1:P1; "Yes";L6:P6)
=SUM.IF(L1:P1;"<5";L1:P1)

COUNT IF *(condition)*

= COUNT.SI (criterion application range; "criterion";range to be counted)
=COUNT.IF(L1:P1; "Yes";L6:P6)
=COUNT.IF(L1:P1;"<5";L1:P1)

BASIC FORMULAS AND FUNCTIONS

COUNT.EMPTY

=COUNT.EMPTY (range)
counts the number of empty cells in the range

AVERAGE

Calculates an average
= AVERAGE(range)
=AVERAGE(A5:L5)

EXERCISES - EXCEL FUNCTIONS

LET'S PRACTICE

Go to tab 4.2 - Indicator tracking on your dashboard.

Column H - Reached

- A sum function is pre-parameterized
- However, not all indicators necessarily correspond to a sum.
- Set the formulas in column H of each indicator

    => calculation information can be found in column C “Calculation method”

You have 15 mins.

FOCUS ON ANALYSIS FUNCTIONS

Tab 2 - Summary and analysis of the dashboard is designed to facilitate certain analyses of data from the other sheets.

Two levels of analysis:

Project data

Visual analysis of key indicators: beneficiaries and cumulative indicators ACTEI

Partly already configured

Project management data

Visual analysis of project implementation data (activities, budget, etc.)

Partly already configured

EXERCISES - EXCEL FUNCTIONS

INDIVIDUALLY

Can you draw a diagram?

Tab 2: Assessment and analysis - Beneficiaries/people of concerned follow-up section.
This data is linked to tab 4.3, total table (bottom).

The diagram is set up to include all types of beneficiary profiles and focuses on gender criteria only.

Based on your own project, modify the diagram to show the information/criteria that's relevant to you.

You have 15 mins.

TIPS

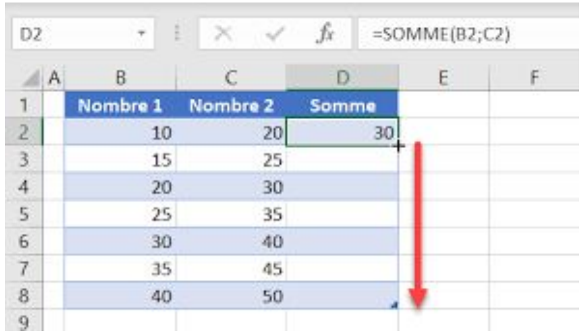
Format cells as much as possible: drop-down list / cell format....

Keep a regular back-up of the dashboard

Reduce the number of people who can edit online and offer read-only access

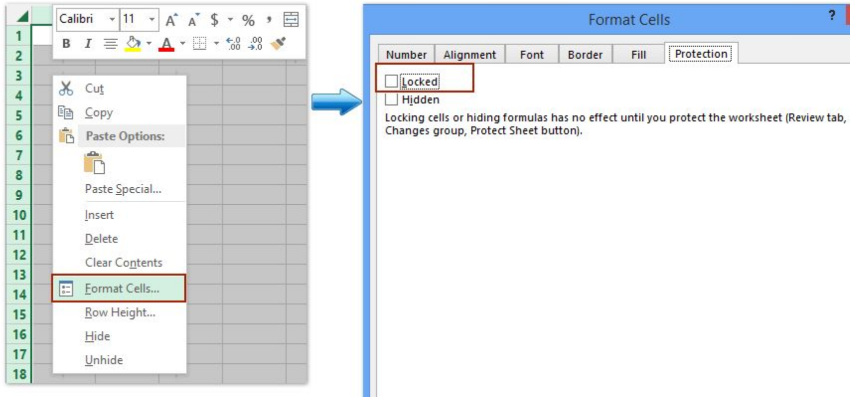
TIPS

Extend/stretch a formula



To make certain data easier to read - use the filter function to isolate certain rows. Note that the filter function does not work if cells are merged.

Protect and lock certain cells or ranges - to limit the risk of modifications.



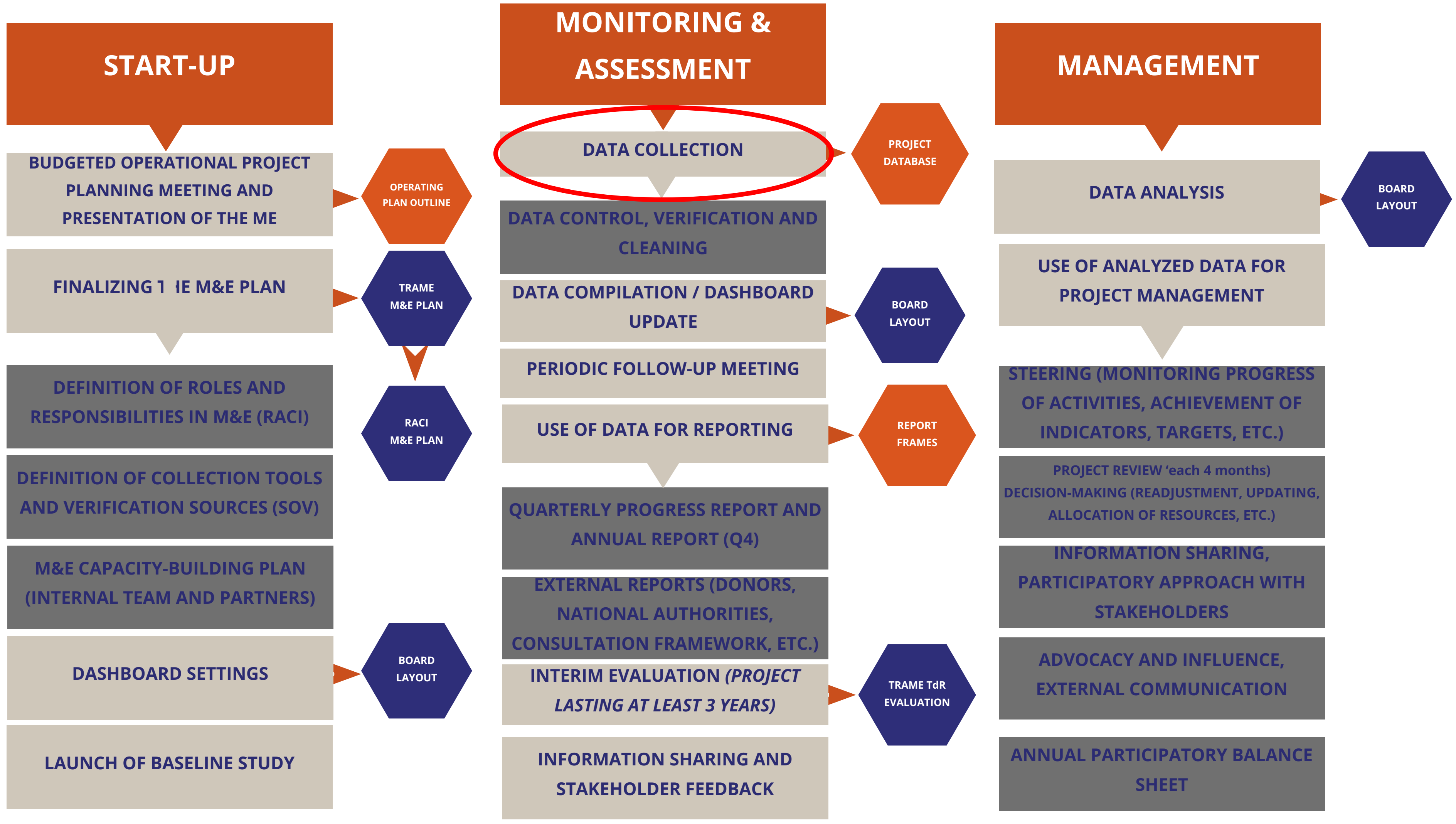
15' BREAK

ACTION EDUCATION

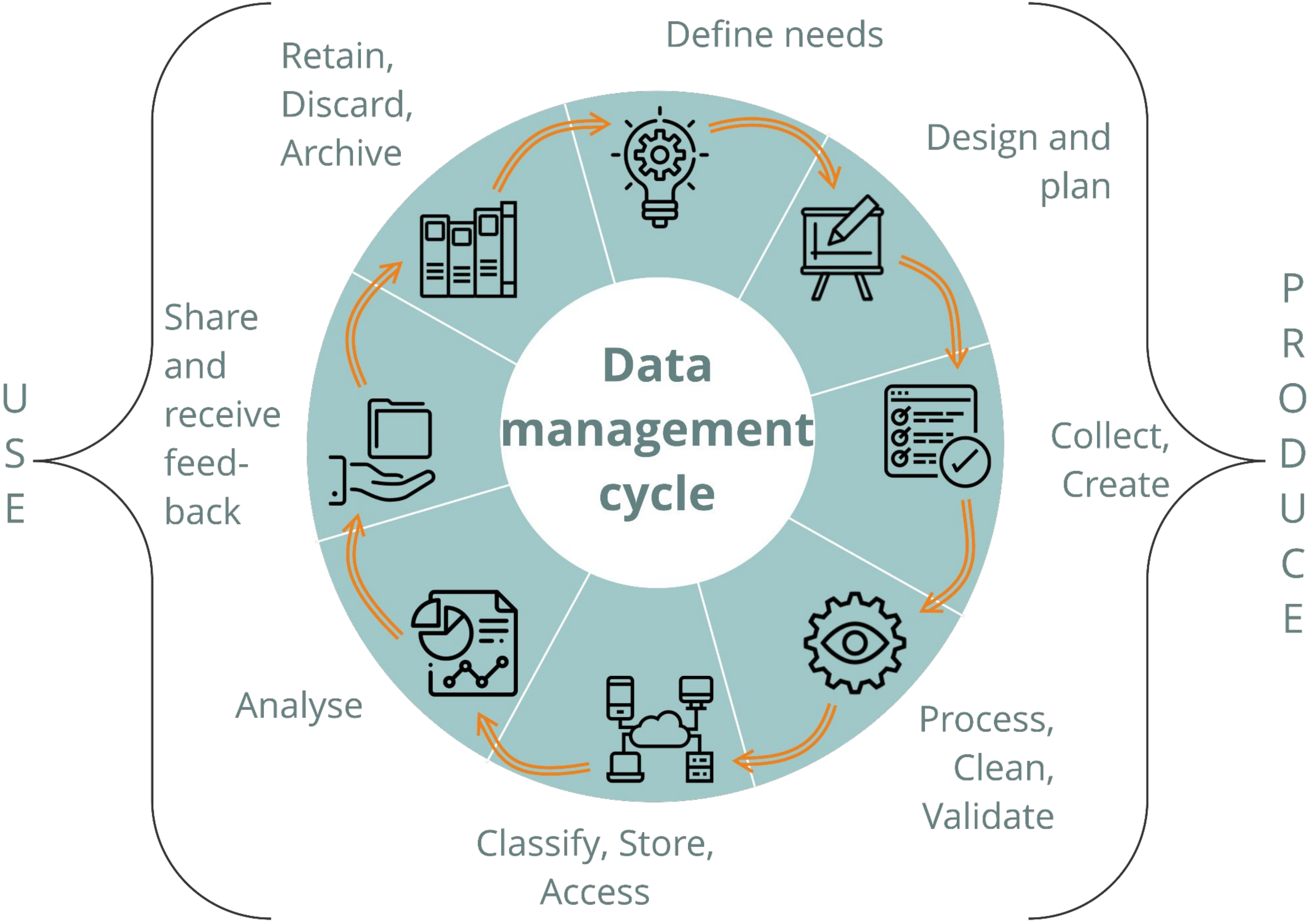
III. DATA COLLECTION

MODULE 4

THE IMPLEMENTATION PHASE



DATA CYCLE



source CartONG

DATA CYCLE

Data collection is part of the data cycle.

Once the planning has been carried out in the **M&E plan**
(tab 4.1 of the dashboard and Monitoring and Evaluation System (word document))

The question is HOW will the indicators be filled in? How will the data be obtained?

What **tools** are we going to use?
What **methods** will we use?

DATA VS. INFORMATION

Data refers to **raw facts or figures** before they are processed and analyzed.

Information refers to **processed and analyzed data** intended for reporting and decision-making

Data is transformed into information when it is **structured** and **given meaning**

DATA COLLECTION - EXCHANGE TIME

WHAT ARE YOUR EXPERIENCES OF DATA COLLECTION?
HOW ARE YOU USED TO COLLECTING DATA?

WHAT ARE THE MAIN DIFFICULTIES AND CONSTRAINTS YOU HAVE ENCOUNTERED?

WHAT ARE THE BEST PRACTICES, TOOLS AND METHODS THAT WORK WELL?

DATA TYPES

2 main data families:

- Primary data: new, directly collected data.
- Secondary data: pre-existing data available from various sources (authorities, ministries, schools, UN, reports from other players, etc.).

4 types of data:

Quantitative Data	Qualitative Data	Geographic / Spatial Data	Audiovisual data
Numerical data that indicate things that can be measured or counted	Descriptive data providing information on attributes, categories, typologies and descriptions of phenomena.	GPS data, geolocation...	(photos, videos, audio, etc.)

THE DIFFERENT METHODS

Quantitative data collection methods: make it possible to extract statistical information on a given situation, and must therefore be representative of the target population.

Qualitative methods: aim to put issues, problems and results into perspective, to include a subjective dimension through the perception of different stakeholders, and to provide details on a situation, a result or a context. There are several types of qualitative studies: observation, semi-structured interviews, focus groups.

DIFFERENT TOOLS: QUANTITATIVE METHODS

The main method for collecting quantitative data is **the survey**. The most commonly used are :

- Baseline/Midline/Endline surveys
- Knowledge, Attitudes and Practices (KAP) surveys
- Satisfaction surveys

A survey is a technique for collecting data by applying a questionnaire to a sample of individuals. In order for the survey to be representative of the program/intervention target population, it must be carried out with a representative sample of individuals. The tools used will need to be adapted to the target audience, especially if children are involved.

Who is the target population, and what tools are most appropriate? What medium should be used (tablet, paper, etc.)?

DIFFERENT TOOLS: QUANTITATIVE METHODS

There are also tools or sources for checking quantitative data: these are not collection tools per se, but media that enable you to record various quantitative information related to the project.

For example, an activity follow-up sheet that tracks the number of sessions carried out, an attendance sheet that tracks the number of participants in a training session, individual child follow-up sheets or pre & post training tests...

Questions to ask: are sources of verification available to teams and partners, and where are they archived or recorded (database, dashboard, etc.)?

THE DIFFERENT TOOLS: QUALITATIVE METHODS

- **Interviews:** Conversation between an interviewer and a respondent (interviewees, informants or sources) during which questions are asked in order to obtain information. Open-ended or semi-structured interviews. The aim is to gather **a person's point of view**, based on his or her role, profile, responsibilities...

Questions to ask yourself: interview grid with open-ended questions to open up discussion; length of interview

- **Focus group discussion:** Open discussion on a particular topic based on an interview guide with a small group of people (between 8 and 12) supervised by a facilitator (recommended a pair to observe group dynamics and take notes).

Questions to ask: composition of the group, mixed or single-sex, trust and benevolence, attention to power dynamics that may exist, attention to balanced participation.

THE DIFFERENT TOOLS: QUALITATIVE METHODS

- **Observation:** Observation is a means of gathering data by observing behavior, events or noting characteristics in an environment (e.g. observation of teachers' teaching practices, observation of changes in the school environment (maintenance of sanitary facilities, safety, etc.).

Questions to ask: define an observation grid and possible common criteria.

- **Participative facilitation (discussion forum):** participative methods that facilitate the exchange of perspectives, experience sharing, analysis, learning and action. It can take the form of a workshop, inviting participants to discuss and reflect collectively on the subject. They can help build a shared vision of the situation, and provide an opportunity to cross-reference different points of view (points of convergence and divergence).

Questions to ask: define the participants, the place and objective of the collective reflections, and the time required.

COMPLEMENTARY TOOLS

DATA COLLECTION TOOLS	QUANTITATIVES	QUALITATIVES	QUALITATIVES (MEDIA)
Focus-group discussions	Possible	well adapted	Possible (audio record)
Key informants interviews		well adapted	Possible (audio record)
Observation			Well adapted : pictures, recording, drawing
Data collection - paper form	Mostly, well adapted	Possible, but less adapted and more limited compared to interviews	Possible but less than mobile data
Data collection - digital tools	Mostly, well adapted	Possible, but less adapted and more limited rather than interviews	Well adapted : pictures, recording, drawing

FOCUS ON SAMPLING

Depending on requirements, it may be necessary to sample the target population: why?

- **It's difficult to reach the entire target population -** *for example, at the end of the work integration program, it will be complicated to survey each young person individually, as some may have left the area (difficult to track them down).*

- **The team is not sufficiently available to collect and analyze too much data (resource and feasibility issues) -** *The team does not have the resources to process all the questionnaires on changes in parenting practices.*

It's best to focus on sampling the target population to ensure data quality, analysis and use.

FOCUS ON SAMPLING

Some basic principles of sampling:

- The sample is a subset of the target population. It must be representative of this population

Principles of representativeness:

- Calculate a few descriptive statistics for the target population to ensure that there are no major differences with the population structure (age, sex, municipality, educational level, social conditions, ethnicity, etc.). *In the dashboard, tab 2- Assessment and analysis, you have a "photo" of the populations concerned which you can use to calculate your sampling.*

Example: the project involved 65% girls and 35% boys => your sample should be composed of the same ratio.

FOCUS ON SAMPLING

Sampling methods

NON-RANDOM METHODS	RANDOM METHODS
Choice based on convenience, accessibility, reasoned choice, quotas, self-selection, volunteering	Random selection, e.g. from database
Limits representativeness and the application of different criteria (location, age, etc.), which can bias the observation, but can also meet research objectives.	Enables statistically representative results to be obtained, but is not always feasible, as it requires sufficient information on the target population and considerable work to calculate sample size and all representativeness criteria.

To find out more: https://cartong.pages.gitlab.cartong.org/learning-corner/fr/2_getting_started_data_analysis/2_4_starting_analysis/2_4_3_plan#echantillonnage

HOW DO I CHOOSE THE RIGHT TOOLS?

How to define the most appropriate tools?

- Skills within your team and those of your partners
- Time: how much time do you have to devote
- Available analysis tools: do you have access to tools that will help you study the data? Will the database work, the dashboard? Will the automatic analysis of the form be sufficient? If you opt for digital tools, do you have the skills in-house?
- Who is your target participants, who will respond, what is their profile and their level of commitment to the collection process (do they agree to answer the questions)? How can you adapt tools and techniques, especially for children?

EXERCISE

DISCUSS

Let's take a moment to look at your ME plan, tab 4.1, based on the latest data collection elements.

Let’s complete column P: What tool or method or source of verification should be used to collect the information?

15 mins.

TO REMEMBER

KEY MESSAGES M4

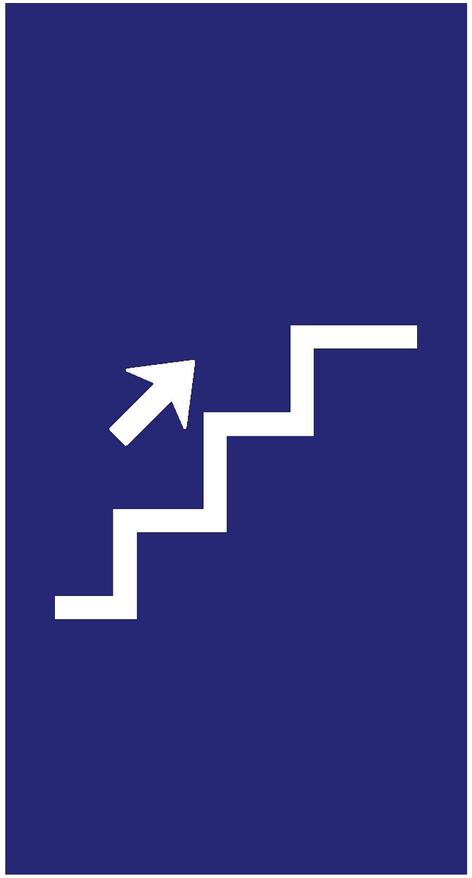
Excel dashboard :

- Using the dashboard requires some Excel skills, otherwise its functionality will be limited.
- Dashboard formulas must be set up at the start of the project.

Data collection :

- Two main sources of data: primary and secondary
- Two main types of data: qualitative and quantitative
- A variety of complementary collection methods and tools
- Importance of adapting tools and methods to the target participants, especially children

NEXT MODULE



Data collection - continued:
- Focus on questionnaire design
- Data quality and control
- Data protection

Analysis and use of data:
- Data analysis principles
- Main uses of information for the project

Information path:
- Information sharing and communication flows

INSTRUCTIONS GROUP WORK

MODULE 4

ACTION EDUCATION

GROUP WORK

MODULE 4

1. Continuing work on dashboard settings

2. Setting formulas for indicator monitoring, tab 4.2, column H

3. Revision of tab 4.1 M&E plan - column P to define collection methods

4. Tab 2 settings -Balance and Analysis

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 4: "Prepare my project dashboard and optimize its features"]*
  - 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 > **GEVEE**
    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.

END OF MODULE 4
THANK YOU!

MODULE 4