ACTION EDUCATION

MONITORING & EVALUATION

EXPERIENTIAL TRAINING

MODULE 5. MONITORING & EVALUATION

ACTION EDUCATION

AGENDA

- I. Data collection (continued) / focus on questionnaires
- II. Data control
- III. Data protection
- IV. Analysis and use
- V. Information path

PEDAGOGICAL OBJECTIVES - MODULE 5

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

- Tips for preparing a quality questionnaire
- M&E implementation - data collection / dashboard use
- Use table data for analysis, dialogue and decision-making
- Use dashboard data for reporting and analysis.
- Identify and implement the information path - the dashboard

YES

EXPERIENCE FEEDBACK

How did you fill in the dashboard?
Have you encountered any particular difficulties?

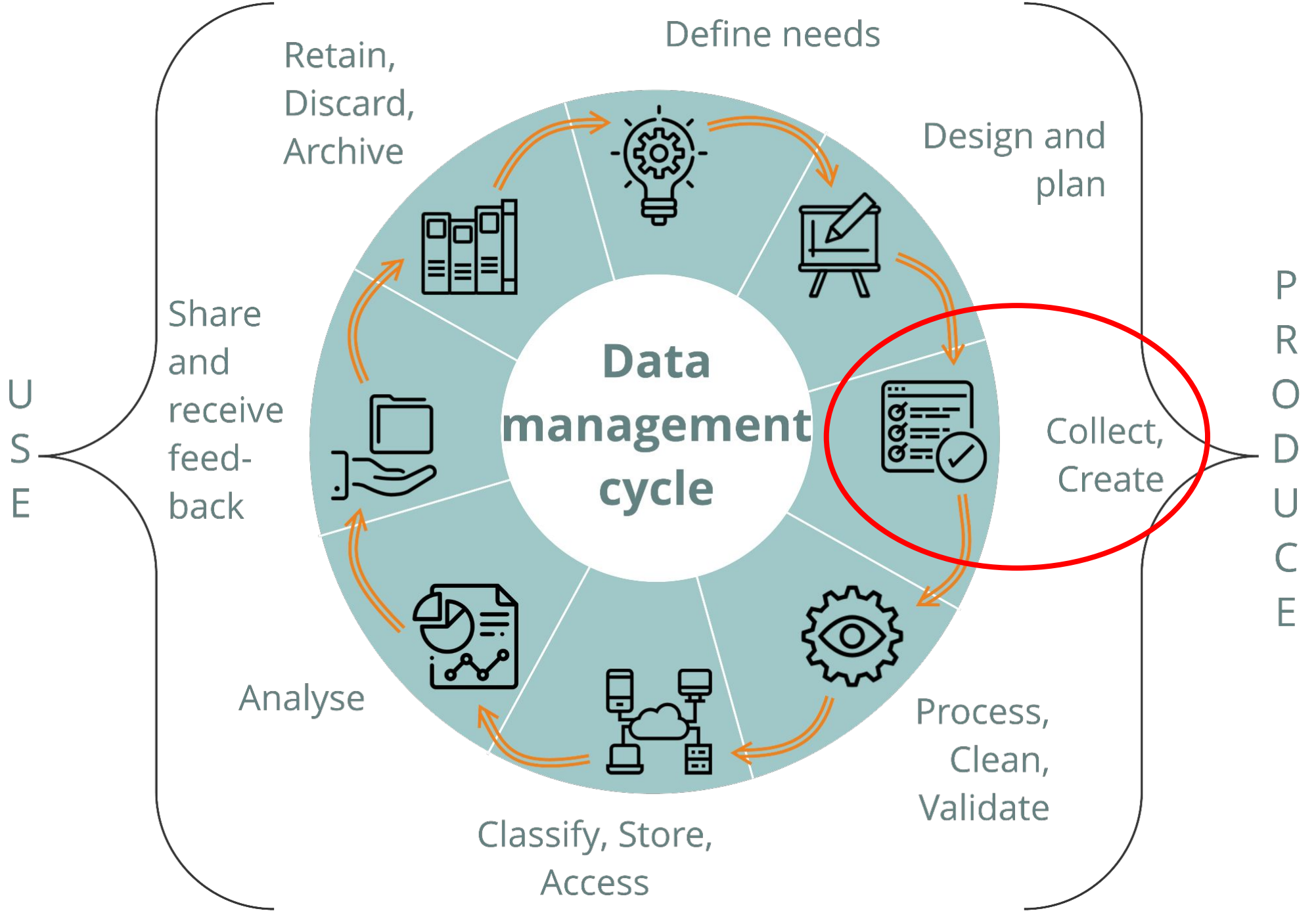
- How can we use the dashboard in the case of large Consortiums, where multiple layers of M&E are involved? At what level should it be filled?
    - Eg: For CCOSC in Cambodia, AEA basically collect all information from “Partners” but, where to inform how and by whom the initial data is actually collected?
- Tab 2: the diagrams here provides information only on very broad data [all beneficiaries] so we are not sure on how that kind of information can be really useful for Program team to make decisions related to implementation.
- Tab 2: the name of beneficiaries categories are too long, could use key words instead. At the moment it only appears as “number of../ number of…/ number of…”
- “Cumulative AEAI” > not clear about that section. What does it mean? And how does it apply? (number of schools built?)
- Laos: when trying to fill it up with a new project, they couldn’t find indicators fitting into the bank of indicators so they had to only create their own.

I. DATA COLLECTION

(CONTINUED)

MODULE 5

DATA CYCLE



source CartONG

DESIGNING TOOLS - EXCHANGE TIME

REMINDER OF MODULE 4

WHAT METHODS AND TOOLS CAN YOU USE TO COLLECT DATA?

DESIGNING TOOLS - FOCUS ON THE

Checklist and tips for designing a form

CHECKLIST	EXPLANATIONS
Formulate understandable questions, with as little technical jargon as possible. Example: DE can have several meanings: Droit de l'enfant vs Diplôme d'Etat	• Avoiding misconceptions and facilitating the appropriation of the form by teams and new interviewers by making the survey self-explanatory • In multilingual contexts, this will also facilitate translation. Don't hesitate to add clues to explain the necessary definitions, or to replace text values with images where this can be useful. During training, use concrete examples, role-playing or answer standardization tests to ensure that everyone has the same understanding of the strategic questions.
Do not attempt to merge questions to reduce the total number of questions.	This complicates the answer and its analysis. So avoid double questions Example: Are there any disabled and/or elderly people, and if so, how many? Replace with: number of disabled people / number of elderly people

DESIGNING TOOLS - FOCUS ON THE

CHECKLIST	EXPLANATIONS
Avoid free-text answers	This complicates the analysis, as it requires individual reading of each answer. If necessary, specify a short answer or key words. Prefer standardized answers, with a choice of answers (response options already formulated) that will make analysis easier.
Limit multiple-response answers	They may appear to be an option, but their analysis requires a great deal of manipulation (filtering, cross-referencing of data and information), which can make analysis more complex and require technical skills.
Keep the question neutral: don't try to influence the respondent.	This will obviously bias the results by encouraging an answer that may not be true.

DESIGNING TOOLS - FOCUS ON THE

CHECKLIST	EXPLANATIONS
Make sure your survey flows logically from one question to the next, and from one group of questions to the next.	This makes it easier for the respondent to read and understand. If they get lost in the questions, they may abandon the form.
Contextualize issues that may directly affect the people concerned. Example: "Are you satisfied with **services** provided to your family ? “	If you don't explain that the answer to this question will have no impact on any additional help you may be able to provide, you run the risk of obtaining a highly underestimated result...

DESIGNING TOOLS - FOCUS ON THE

CHECKLIST	EXPLANATIONS
Consider the reasons for making questions compulsory	Certain questions can be made compulsory, to improve the quality of the analysis. However, the following questions should be considered: - for technical reasons (especially on mobile devices) where certain data (GPS, for example) may not work, thus blocking the rest of the form; - some questionnaires depend on several people. If they are not available at the time of the survey, it will not be possible to complete the form; - if you're not sure about the suggested answers, or even the relevance of the question, it's best to leave it open-ended. Failure to answer a question is in itself data that you can analyze: the question is not well formulated, the subject of the question is not perceived by the people concerned.... - people might be tempted to answer randomly, without conviction, and move on to the next question, which would skew the quality of the data.

COMPARISON BETWEEN MOBILE DATA COLLECTION (MDC) AND PAPER BASE

MDC compared to Paper-based data collection

Advantages and disadvantages

VS

MDC Advantages

- Improved data quality and analytical capacities with integrated calculation, data validation constraints, skip logic, no handwriting issues, ...
- Integrated tool to collect different types of multimedia: GPS points, pictures, signatures, audio recordings, barcodes, ...
- Time saving: easier and faster analysis
- Better day-to-day monitoring of the data collection process and possibility of remote access to data
- Cost saving in the long run: less human resources (no need for data entry clerks)
- Centralized online archiving: reduced risk of data loss if well managed
- Interviewers go lighter in the field

MDC Disadvantages

- Longer preparation phase for designing, coding and testing the survey
- Can be intimidating and create distance with the person interviewed. Not appropriate in some contexts
- Can be a safety issue for staff in some contexts (targeting, theft, ...)
- Requires more technical skills in the project system implementation (longer training, adapted skills)
- Significant initial investment (purchase of mobile phones)
- Fragile devices and risk of technical issues
- Dependence on electricity for use and internet connexion for data synchronization
- Not adapted for qualitative surveys

QUESTIONNAIRE SUPPORT

Examples of digital media for mobile data collection

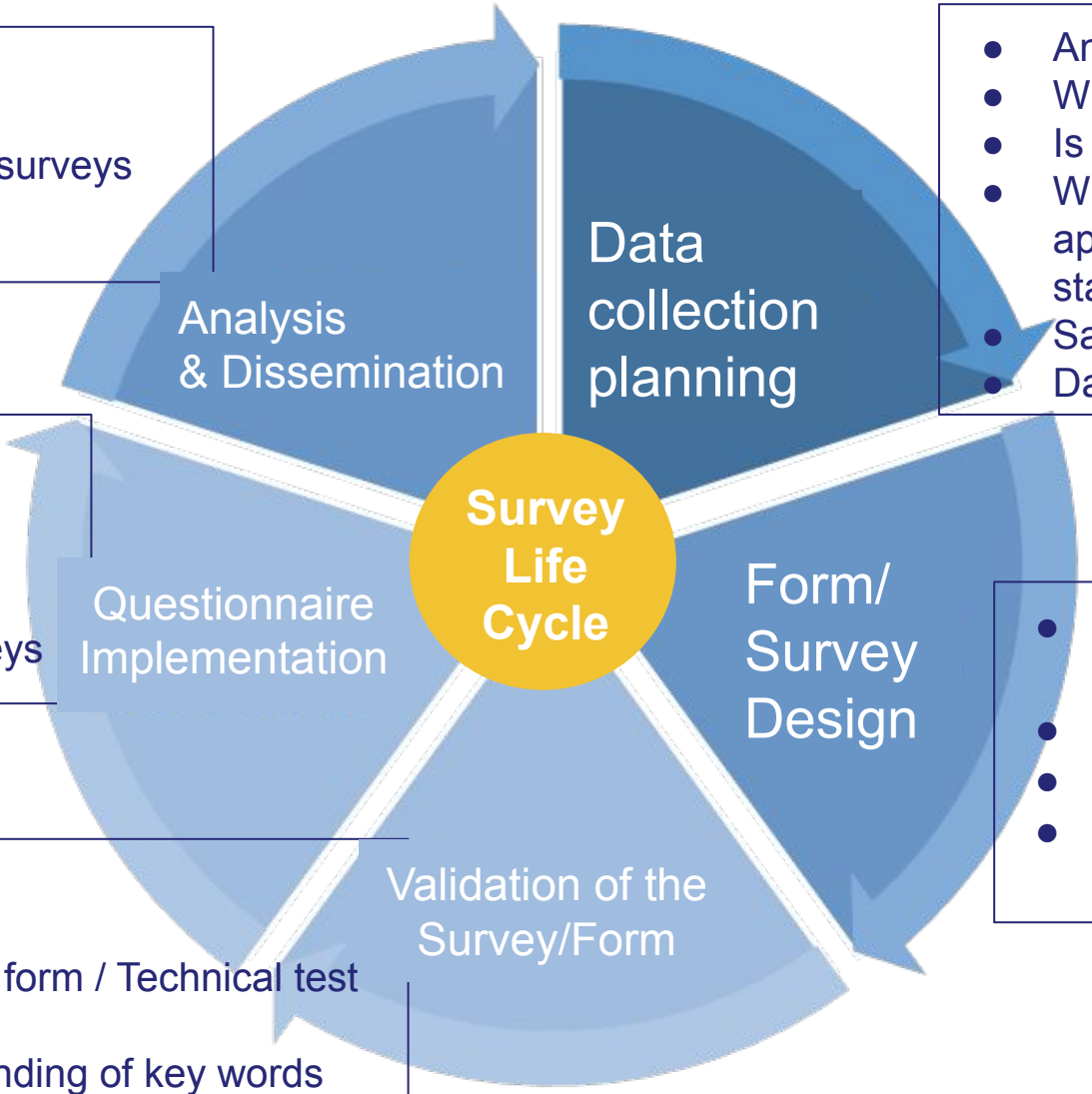
- **Kobo tool box:** free for NGOs; easy, intuitive form design; question tree options. However, direct analysis on the platform is very limited (Kobo tool box is not an analysis tool). This requires data to be extracted into Excel for analysis; possibility of multi-language forms.

- **Google form:** free; easy, intuitive form design; question tree structure remains linear (more difficult to condition a question to a specific answer / only to the previous answer); relatively complete answer analysis and excel extraction facility to complete the analysis if required; limited data protection.

- **Survey CTO:** fee-based service; excel spreadsheet export is required for full data visualization; form design is possible on the platform; options for question tree structure; platform is in English.

To find out more: https://alnap.org/help-library/resources/benchmarking-de-solutions-de-collecte-de-donnees-sur-mobile-2021/

SURVEY - BEST PRACTICES



- Analysis plan/ Dashboard
- What is the desired level of quality
- Is data collection necessary?
- What data collection methods are most appropriate (consider the safety context for staff and beneficiaries)?
- Sampling
- Data collection tool

- Technical tips and tricks (metadata, constraints, etc.)
- Language
- Questionnaire length
- Consent

- Standardization test
- Pilot site
- Technical validation of the form / Technical test (form of results...)
- Consider testing understanding of key words and concepts and survey feasibility

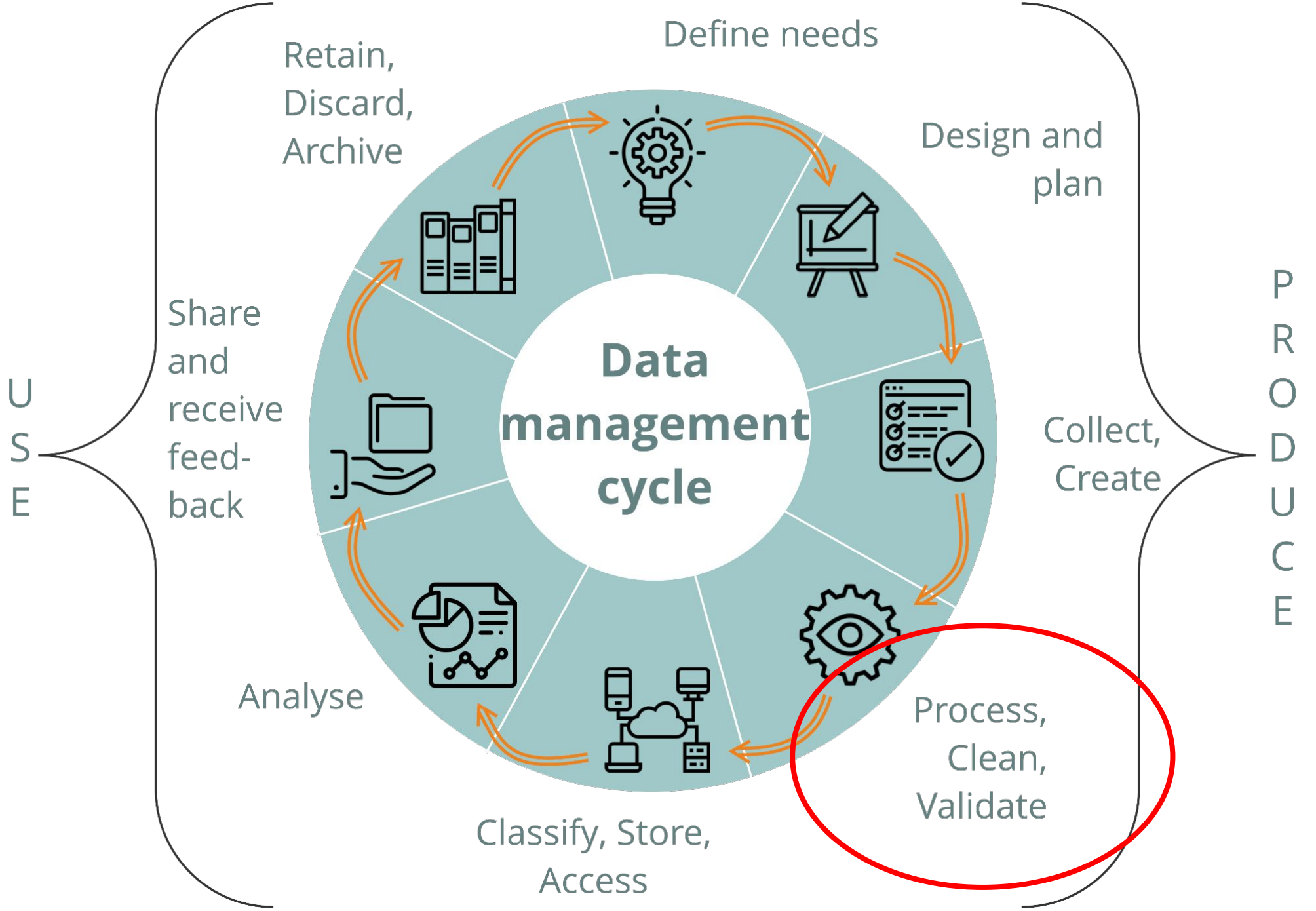
- Continuous quality control of survey submissions
- Frequent debriefing with interviewers
- Language control during surveys

- Survey feedback
- Clean archiving
- Form availability for other surveys
- Feedback to respondents

II. DATA CONTROL

MODULE 5

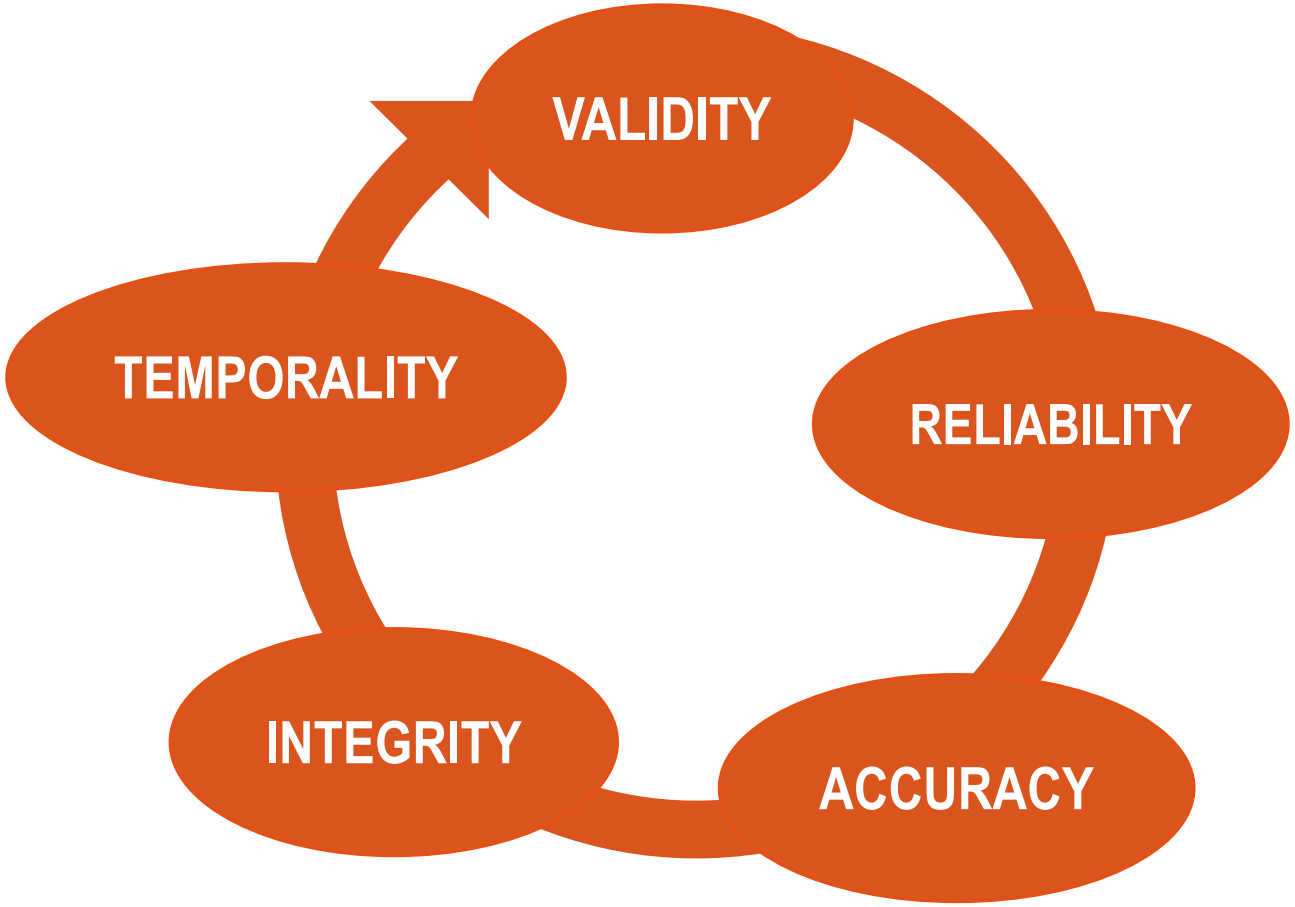
DATA CYCLE



source CartONG

DATA QUALITY: WHAT TO THINK ABOUT?

- **Validity** - Question(s) asked
- **Reliability** - Collection method(s)
- **Accuracy** - Sampling strategy
- **Integrity** - Data processing and management processes
- **Temporality** - Calendar + Planning



DATA CONTROL

In a monitoring-evaluation system, it is essential to check, control, clean and validate the data, whether in your database, your dashboard or the results of your questionnaires.

Data entry errors can happen to anyone. Reviewing your data will enable you to detect errors. In Excel, signals can indicate these errors and enable you to rectify (clean up) the data.

In a large database, select a representative number of rows and check the consistency of the answers/data entered.

Identify common errors and ask questions :

- the wording of your question
- the interviewer, who in the event of a repeated error may not have entered the question.

DATA CONTROL

In a monitoring-evaluation system, it is essential to check, control, clean and validate the data, whether in your database, your dashboard or the results of your questionnaires.

Provide your teams with **regular feedback** on data quality, so as to improve the data collected and entered in a **pedagogical** way.

Who in your team has been identified as carrying out this data control and cleansing, and **when**?

Data sharing and collective analysis time also help to check consistency, possible biases and data quality (difficulties encountered, etc.).

II. DATA PROTECTION

MODULE 5

DATA PROTECTION - EXCHANGE TIME

WHAT DOES THE NOTION OF DATA PROTECTION MEAN TO YOU?

HAVE YOU ALREADY IMPLEMENTED DATA AND RESPONDENT PROTECTION RULES? IF SO, WHICH ONES?

ETHICAL CONSIDERATION OF DATA

- Informed consent
- Do no harm
- Confidentiality / Anonymity / Privacy
- Respect for the individual (respect for their time, experience, feelings - link with acceptance)
- Share results (provide "closing the loop" feedback)
- Physical protection (limit access, no unintentional sharing)
- Limit *risks (collect only what will be used)*

DATA PROTECTION

Data protection must also be considered in terms of storage, accessibility and protection. We need to ask ourselves, in light of the do no harm principle, but also national and international regulations (Europe: RGPD)

Do you hold sensitive data?
Are they anonymized?
Where they are stored (paper or digital)

If you use a platform/cloud, is it protected?

How long do we need to keep and store this data?
Identify a time limit for data storage.

15’ BREAK

III. ANALYSIS AND USE

MODULE 5

THE IMPLEMENTATION PHASE

START-UP

- BUDGETED OPERATIONAL PROJECT PLANNING MEETING AND PRESENTATION OF THE M&E → OPERATING PLAN OUTLINE
- FINALIZING T IE M&E PLAN → TRAME M&E PLAN
- DEFINITION OF ROLES AND RESPONSIBILITIES IN S&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 → BOARD LAYOUT
- LAUNCH OF BASELINE STUDY

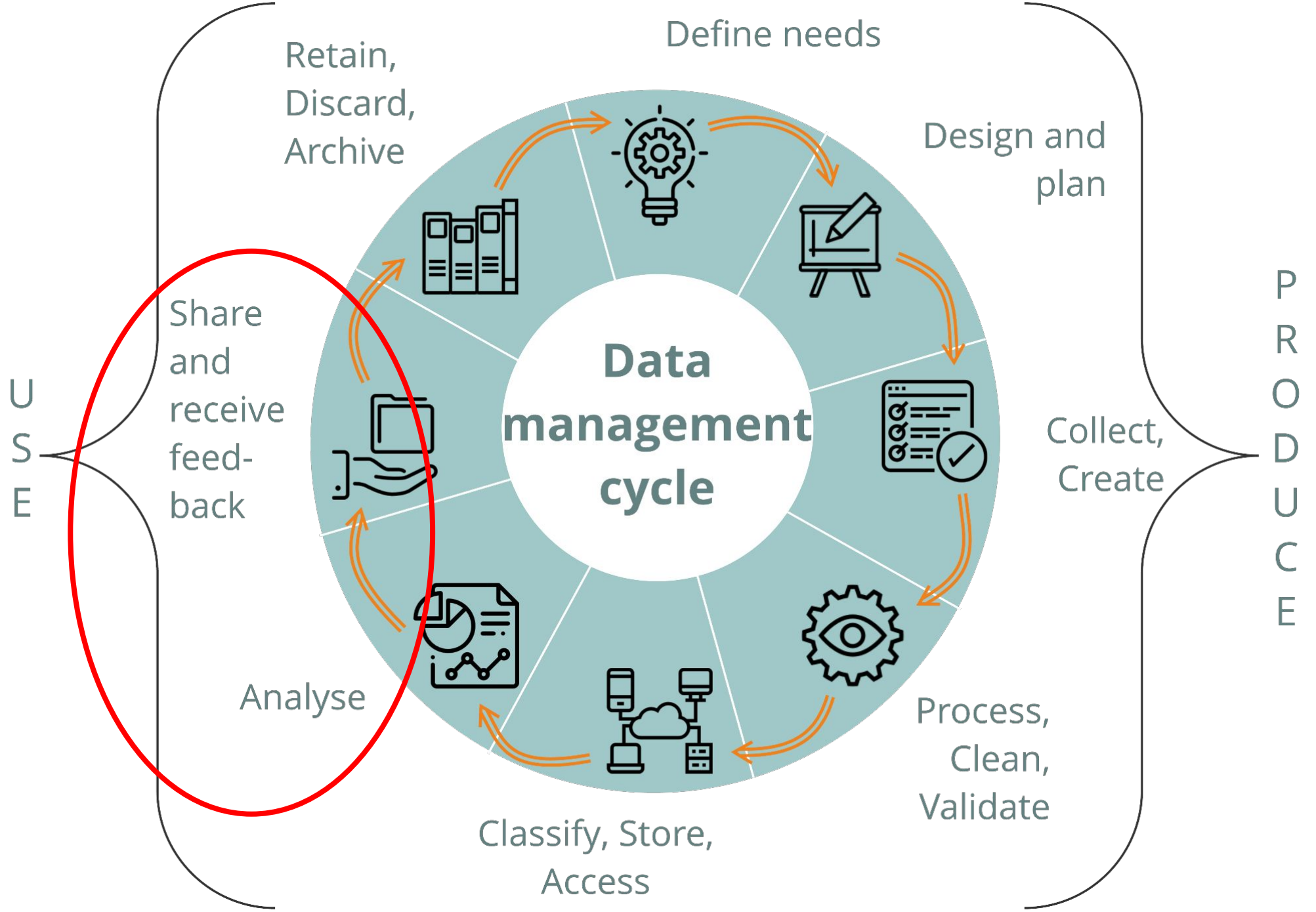
MONITORING & ASSESSMENT

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

MANAGEMENT

- DATA ANALYSIS → BOARD LAYOUT
- 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

DATA CYCLE



source CartONG

DATA ANALYSIS

Data analysis is the application of techniques applied to data to reveal useful information and support decision-making.

After data collection, each individual data item can be assembled into a "dataset" and, using data analysis techniques, provide useful information.

The information uncovered by data analysis can then be used to facilitate decision-making.

DATA ANALYSIS - HOW TO DO IT?

Tab 2 in the Dashboard: Summary and analysis allows you to identify and visualize certain cross-referenced data.

Further analysis may be required.

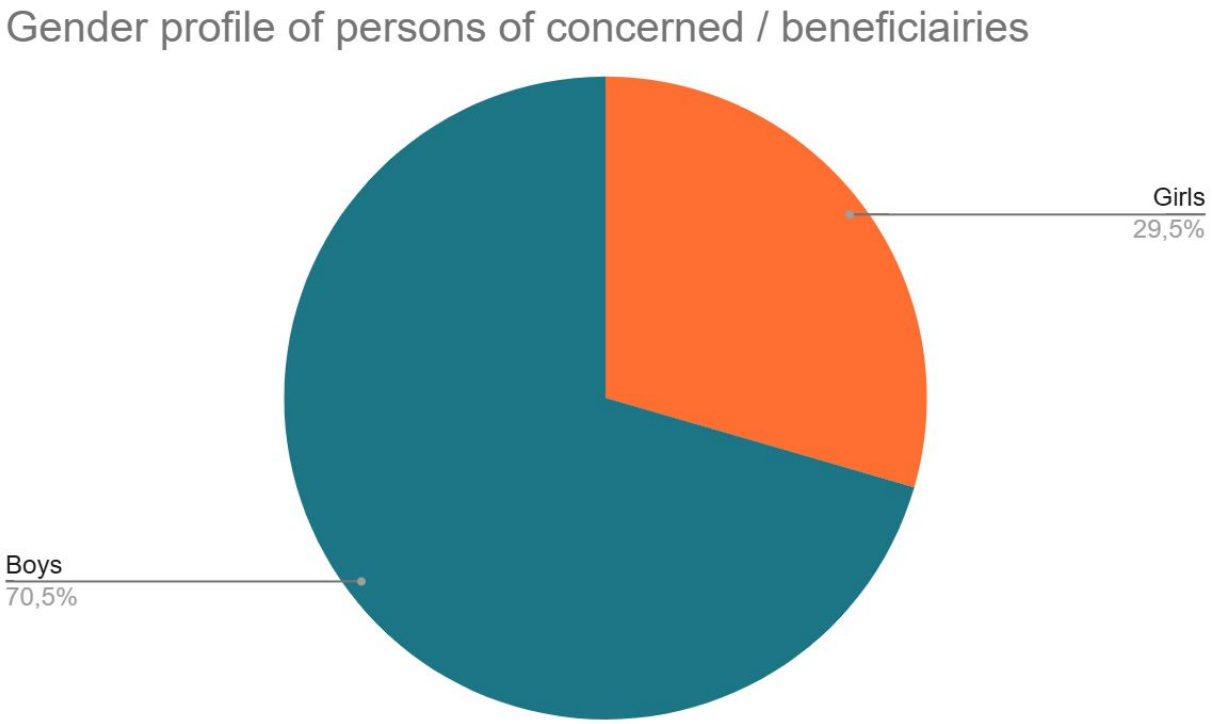
Data without analysis can mean anything and everything, so it's important to put them into dialogue. It's a question of putting certain information into perspective, cross-referencing it with qualitative information and arguing it to make it relevant and coherent.

The dialogue must be based on a participatory approach involving the various stakeholders.

DATA ANALYSIS - EXAMPLE

Follow-up of beneficiaries/people reached

At the midterm point of your project, here is the gender profile data of the children reached by the project. What do you observe? How do you analyze and interpret this information? What kind of decisions need to be made for the project's future?



EXERCISES - CASE STUDIES

LET'S PRACTICE

On tab 2 of the dashboard, analyze the various items of information.

Fill the "narrative indications" boxes with information, possible explanations, questions and possible décisions.

You may also identify issues related to the dashboard format: for example, what information would have been useful to include or visualize.

You have 15 mins.

USE - EXCHANGE TIME

HOW DO YOU THINK YOU CAN USE THE INFORMATION YOU'VE GATHERED IN THE M&E (ILLUSTRATED IN THE DASHBOARD)?

AS A PROJECT MANAGER, HOW CAN THIS INFORMATION HELP YOU MANAGE YOUR PROJECT?

WHAT ARE YOU GOING TO DO WITH THIS INFORMATION?

USE

Use of analyzed data for project management

- Steering (monitoring progress of activities, achievement of indicators, targets, etc.)
- Decision-making (readjustment, updating, allocation of resources, etc.)
- Information sharing, participatory approach with stakeholders
- Annual participatory review
- Advocacy and influence, external communication

- Use action plan management and progress monitoring information. What decisions should be taken for activities that are significantly behind schedule?
- Make decisions regarding budget consumption
- Check the relevance of indicators
- Redirect activities if necessary

- Communicate information to partners and share information (explain delays, progress, results, etc.).
- Ensure accountability to partners and transparency
- Contribute to horizontal and collective management

- Use data to inform, influence and advocate: your data and statistics on the people affected/concerned (school enrolment rates, results achieved...).

V. INFORMATION PATH

MODULE 5

DATA & INFORMATION PATH

The point of a monitoring-evaluation system and data management is to circulate information.

It is therefore essential to clearly define the data and information flow in the M&E plan (document word).

Who holds the information?

Who does he give it to?

Who records the data *(DB/Dashboard)* ?

Who takes part in the analysis?

Who do we give information to? [internally]

Who do we share information with? [stakeholders]

This step is often overlooked, yet it is essential to the principle of accountability.

DATA & INFORMATION PATH

Example - Dashboard

WHEN ?	Monthly - no later than the XXth of each month	Monthly - no later than the XXth of each month	Quarterly - no later than the XXth of each quarter	Monthly - no later than the XXth of each month	Quarterly - no later than the XXth of each quarter	Quarterly - no later than the XXth of each quarter
WHAT ?	Dashboard update: tab 3 (action plan), tab 4 (indicator tracking)	Dialogue and data analysis - monthly project follow-up meeting. Complete the "analysis" boxes in Tab 2 (balance sheet and analysis)	Dialogue/reconciliation tab 5, budget monitoring, and accounting data, complete comments column	Sharing the dashboard - Country Direction	Sharing the dashboard (in addition to the quarterly report) with Director of Programs and Technical Resources	Sharing feedback, comments, questions, analysis, needs, from international management to the project team
WHO ?	Project manager (in collaboration with MEAL manager?)	Project team members, support teams and operational partners involved, regional team (optional participants /Project	The project manager and administrative manager	**from** : Project managers to : Country Director **cc**: Administrative manager, logistics manager? partners?	**from** : Country Director to : Regional Programs Coordinator **cc**: Regional Finance and Support Services Coordinator	**from** : Regional Programs Coordinator to : Project Manager **cc**: Country Director

TO REMEMBER

KEY MESSAGES M5

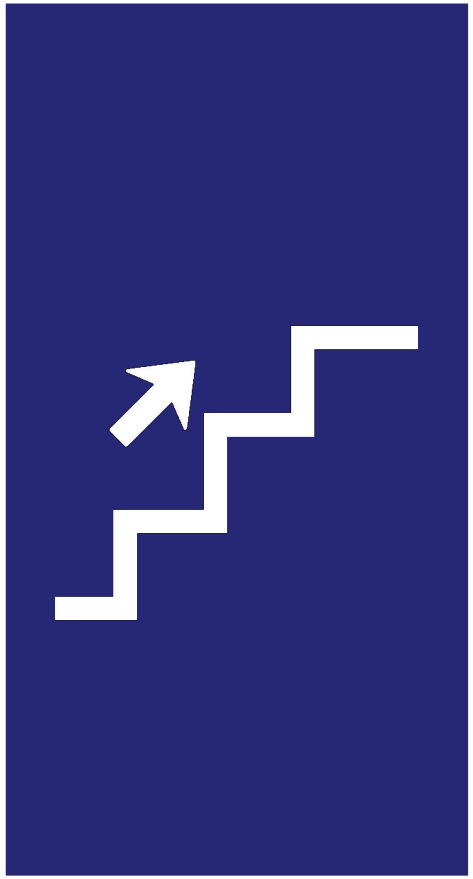
Data collection :

- Design your questionnaire to suit your participants. Limit questions to essential information.
- An important data quality control and cleaning step to ensure the reliability of the analysis.
- The guiding principle is to do no harm when collecting and using data

Data analysis :

- All data must be analyzed to become relevant, usable and shareable information.
- A collective and participative analysis
- Using data to enhance project management efficiency and accountability.

NEXT MODULE



Transition and closing phase

- M&E process and milestones for project closure
- How to prepare a final evaluation

End of training:

- Reviews

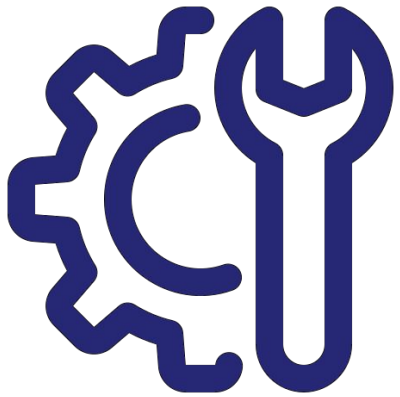
INSTRUCTIONS GROUP WORK

MODULE 5

ACTION EDUCATION

GROUP WORK

MODULE 5



1. Continue work on setting dashboard parameters, in particular tab 2 - balance sheet and analysis.

2. Initiate data entry in tab 3 (action plan) and tab 4.2 (indicator tracking).

3. View the first possible analyses.

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: "Start using the dashboard and analyze the first available data"]*
  - 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 5

THANK YOU!

MODULE 5