Monitoring and Evaluation Training Guide

This Guide is. . .

The material in this module is intended to help facilitate training in monitoring and evaluation in the results framework.

The materials include exercises, session notes and agendas for conducting training sessions ranging from one and a half hours to two days. Reference materials that the facilitator will need are mentioned but not part of this package, as they are available elsewhere both in the printed form and online.

This guide could be used by trainers who are new to their role in facilitating training activities but have significant experience with the concepts.

Instructions to the facilitator on how to conduct the sessions are provided as well as instructions to participants; also included are discussion points and answers to questions in the exercises. For easy reference the material is colour coded.

Instructions to the participant are to be copied and handed out before each activity.

Assessing Needs

It is advisable to conduct a Needs Assessment before planning a course. Ideally this should be done about 4 weeks before the training so that the participants have time to respond and you have time to prepare the materials. Depending on their needs you may want to add or drop sessions or decide to allocate time differently than what is presented here.

Getting Ready

Involve your co-trainer in all the decision-making regarding the course. Review materials and share needs assessment feedback with him/her. Inform participants of start and end dates and times, and send them a reading list early.

Reference Documents

Handbook on Monitoring and Evaluating for Results, Evaluation Office, UNDP, 2002

Advancing Results-Based Programming and Simplification of Programme Procedures UNDP/PROG/01/02 16 November 2001

New Country Programme Format, Review and Approval Process UNDP/PROG/01/03. 28 November 2001

Capacity Assessment and Development In a Systems and Strategic Management Context Guidelines, MDGD/January1998

List of Sessions

Session 1: A Basic Introduction to the Monitoring & 1 ½ hours
Evaluation Framework

Session 2: A Basic Introduction to the Monitoring & 2 ½ hours
Evaluation Framework (2)

Session 3: Essentials of Monitoring & Evaluation: ½ day
Indicators and Outcome Monitoring

Session 4: Essentials of Outcome Monitoring and ½ day
Outcome Evaluation

Session 5: Essentials of Monitoring & Evaluation **1 day**

Session 6: Essentials of Monitoring & Evaluation (2) **2 days**

Session 7: Essentials of Monitoring and Evaluation for **½ day**
Project Staff

List of Exercises

Exercise 1 Analysing Issues, Preparing an Action List **1 hr 15 min**

Exercise 2 Designing Monitoring Tools **1 hr 15 min**

Exercise 3 Getting Partners Involved **2 hrs**

Exercise 4 Annual Project Review (Project Staff) **1 hr 30 min**

Exercise 5 Introducing Monitoring Tools (Project Staff) **1 hr 15 min**

Structured Discussion on Compliance and Evaluation 1 hour, 30 min
Planning

2 hrs 30 min

Exercise 7 Designing Monitoring Tools-Irugao (UNDP staff)

2 hrs 30 min

Exercise 8 Planning an Outcome Evaluation

1 hour

Exercise 9 Using Feedback from M & E

To prepare for conducting the training...

Select the materials for the session you plan to deliver. This will depend on the time available to you and the needs expressed by your participants. If you are going to create your own session, select exercises, quiz cards and slides. Review the materials and the reference documents.

The timing used here is approximate and works best with a group of about 25. You need to give yourself additional time to open and close sessions and introduce participants. No break times are included, so allow additional time than what is given here.

Review and duplicate the Instructions to Participants' sheets, and prepare copies of presentation slides as handouts. Check each day's agenda to see what materials you will need.

Materials you will need

Name cards for each participant

Flipchart stands- about 6

Flipchart pads

Lots of thick markers- in colours

Index cards in three or four colours- can be made by cutting A4 size paper in half.

A computer that can be used for presentations and screen for projection

A side table for materials and documentation

The presentations saved in a computer hard- drive or diskette.

Quiz cards 4 complete sets.

Training facilities

Most activities involve working in small groups. Arrange the room so that 4 or 5 participants can sit around a small work- table, while still being able to hear and see you. Have enough flipchart stands for group work. A pleasant well-lit room that is away from ringing telephones, with plenty of wall space for posting flip charts, is ideal. Break out space would be needed for group work.

How to adapt these materials to your needs

You can use these materials to deliver a short 1 ½ hour session to a 2-day course or if you wish you can use the individual sessions in larger courses with other related topics. There are 7 sessions provided here, but you can create more.

Following are some ways in which you may adapt the materials.

Cases-You may use participants' own cases instead of the examples given here.

Exercises- Examples in the exercises may be replaced by participants own projects, outcomes, outputs and indicators.

Presentations -There are three slide presentations on the Evaluation Office Website. Mix and match the slides according to the interests of your audience.

Lecturettes- There is one lecturette on Indicators. Feel free to develop your own. Always keep it under 20 minutes, always ask questions and bring in examples.

Quiz cards- Select what is appropriate to the overall content of your session or course. It is not recommended that you use quiz cards for more than one activity, he duration of which should be about 45 minutes. People are likely to get bored. The quiz cards are intended for self-study, for use as an introduction to a topic or "a filler" if one group of participants finishes before others.

How to create new sessions and courses

You can use the materials in this collection as building blocks to create new sessions or courses. The overall objectives will change depending on what you want to accomplish.

Facilitation

Interaction is critical for learner participation in training. Learning is at an optimum level when participants are able to share their knowledge with each other and apply their experience to understand new concepts presented through the training. The exercises and group work are meant to fulfil this purpose.

The best way to obtain feedback is through asking good questions. Most activities conclude with "process questions" which would help the trainer summarise and close the session as well as give participants an opportunity to share their ideas.

At the start of the course as well as the beginning of each activity it is most important to clarify the objective or purpose and describe the agenda. This gives structure and direction to what the facilitator intends to do.

For maximum participation the facilitator should respond to the needs expressed during the course. Feel free to deviate from your plans or the agenda provided here, if it is in response to what participants want.

Working with a co-facilitator

Working with a co-facilitator will reduce anxiety considerably. A joint training venture-- a team effort, where responsibility is shared-- will reduce stress and prevent burn out. Having two training styles and a change of face is less tedious for participants as well.

If conducting this course with a co-trainer (it is highly recommended!) be sure to clarify both the tasks and the roles with your colleague before the start of the training. The person who has most knowledge of the subject matter would need to assume the role of the lead trainer.

Here are some Do's for working with another person.

- Go over the materials and divide the main tasks, such as- introducing the topic, delivering content, writing on the flip chart and doing the wrap up.

- If one trainer decides to take the speaking role the other can take the task of recording or charting on the flipchart.

- Whatever the role or task, stick to the agreement, don't change mid-stream and throw the other person off guard.

- If yours is a supportive role, to back up the trainer if s/he forgets to point out an important fact, stay out of the discussion, until you get your cue from the other trainer to join in. Seeming to "fight" in front of the group could create tension for everybody.

- Having one trainer sit in the back of the room and intervene when invited to do so, to reinforce a point or add something that may have been left out, is both helpful and supportive.

- Always review the collaboration at the end of the day and discuss what worked and why and where improvement may be necessary.