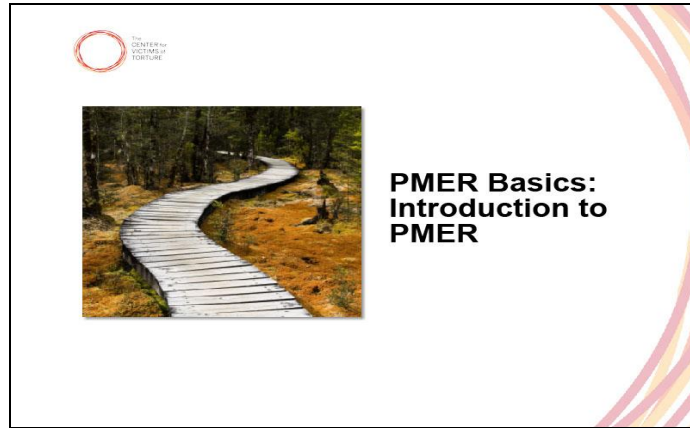


Slide 1 - Curriculum Title

Text Captions: Capacity Building Curriculum

Monitoring and Evaluation

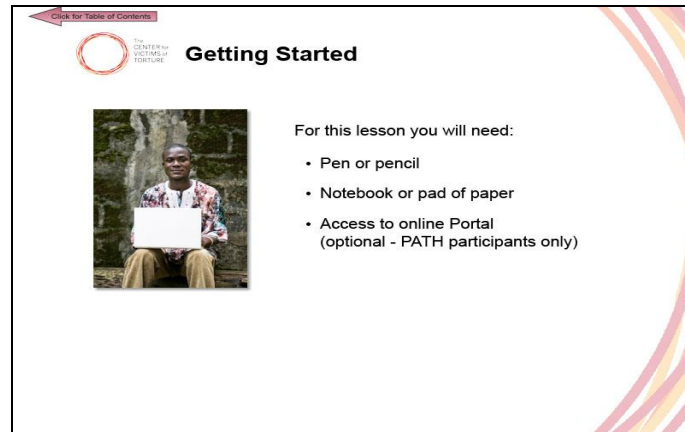
Music: Sweet - Bensound.com



Slide 2 - Lesson Welcome: PMER Basics, Introduction to PMER

Slide notes: Welcome to the Introduction to PMER lesson in the PMER Basics Unit of the Monitoring and Evaluation curriculum.


Text Captions: PMER Basics: Introduction to PMER



Click for Table of Contents

The CENTER for VICTIMS of TORTURE

Getting Started



For this lesson you will need:

- Pen or pencil
- Notebook or pad of paper
- Access to online Portal (optional - PATH participants only)

Slide 3 - Getting Started

Slide notes: As you go through these lessons, you should be prepared with a pen or pencil and a notebook or pad of paper that you can use to write down your thoughts, or for any journal activities during the lesson.

If you are taking this lesson as a part of the PATH program or a course within another specific capacity building program, you may also be invited to access additional resources, take part in discussion forums, or take part in other activities, assignments or presentations with other participants through an online portal.

Remember, at any time you can click the Table of Contents links to the left of this screen to jump ahead or go back to other screens in this lesson. Also, be sure to click the Complete button on the Resources screen at the end of this lesson.

Text Captions: Getting Started

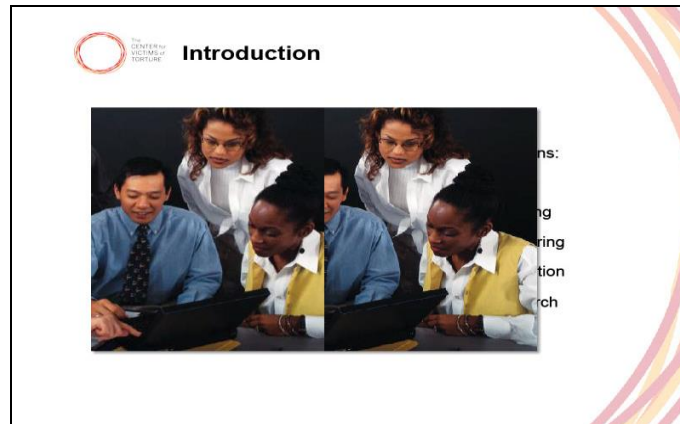
For this lesson you will need:

Pen or pencil

Notebook or pad of paper

Access to online Portal (optional - PATH participants only)

Click for Table of Contents



Slide 4 - Introduction

Slide notes: More and more, PMER is recognized as an important set of practices for treatment organizations.

The systems, processes and information associated with PMER are vital to ensure quality programs, enhance the impact of existing programs, and, increasingly, to secure funding.

Still, for many organizations, PMER is an afterthought. Many do not have the training to do it well or with confidence, and many organizations do not do any PMER at all.

This is the first of five lessons in the PMER Basics unit. Please note that these five lessons are not meant to teach you the technical skills to do PMER, but rather, to address some of the key ideas, concepts, and language around PMER.

The unit is designed to help us develop a shared understanding of the basic PMER principles, purposes and processes. In this lesson, we will get a brief overview of PMER—what it is and why it matters.

Text Captions: Introduction

This unit includes 5 lessons:

Introduction to PMER

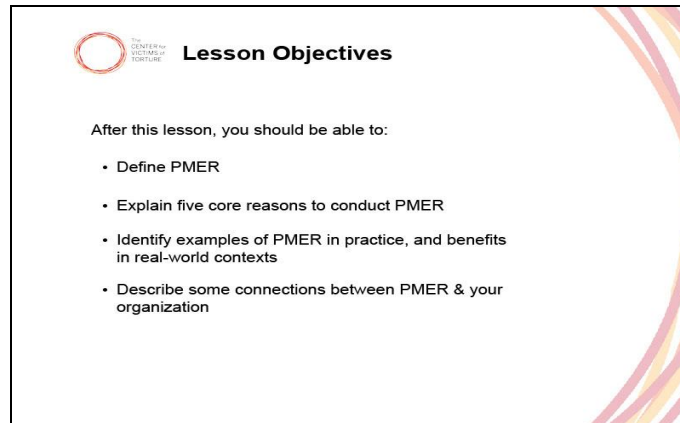
PMER Basics: Planning

PMER Basics: Monitoring

PMER Basics: Evaluation

PMER Basics: Research

Introduction to PMER



The slide features a logo for 'The CENTER for VIRTUALITY' on the left, consisting of a red circle with a white outline and the text 'The CENTER for VIRTUALITY' to its right. The main title 'Lesson Objectives' is positioned to the right of the logo. Below the title, the text 'After this lesson, you should be able to:' is followed by a bulleted list of four objectives. The slide has a decorative curved border on the right side with a gradient of pink, orange, and yellow.

Lesson Objectives

After this lesson, you should be able to:

- Define PMER
- Explain five core reasons to conduct PMER
- Identify examples of PMER in practice, and benefits in real-world contexts
- Describe some connections between PMER & your organization

Slide 5 - Lesson Objectives

Slide notes: After this lesson, you should be able to: Define PMER. Explain the core reasons to conduct PMER. Identify examples of PMER in practice and the benefits of PMER in real-world contexts.

Describe some preliminary ways in which PMER relates to—or could relate to—your own organization and its work.

Text Captions: Lesson Objectives

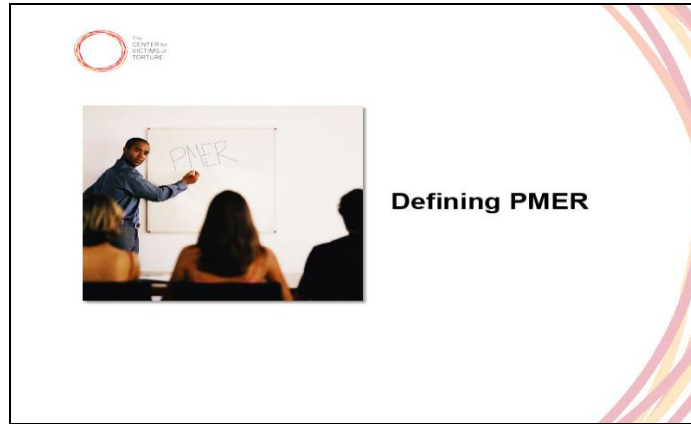
After this lesson, you should be able to:

Define PMER

Explain five core reasons to conduct PMER

Identify examples of PMER in practice, and benefits in real-world contexts

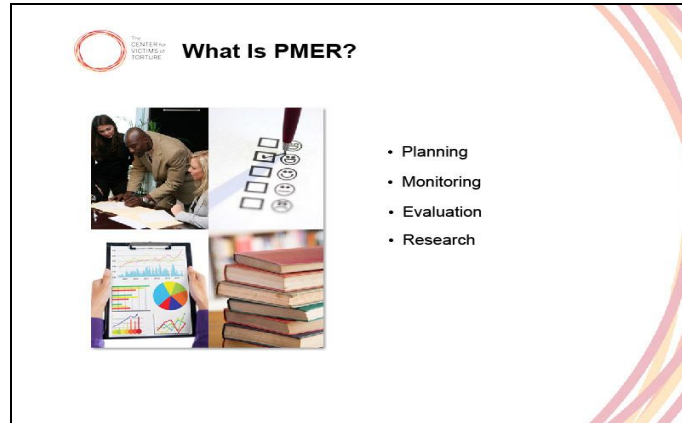
Describe some connections between PMER & your organization



Slide 6 - Defining PMER

Slide notes: Now, let's begin to explore the important practice of PMER. We will start by making sure we have a clear and shared definition of each of the components that together make up PMER.

Text Captions: Defining PMER



Slide 7 - What Is PMER?

Slide notes: PMER stands for Planning, Monitoring, Evaluation and Research.

Note that sometimes the R in PMER refers to reporting. But, for our purposes, R refers to research, and reporting is integrated into each component of PMER.

Text Captions: What Is PMER?

Planning

Monitoring

Evaluation

Research

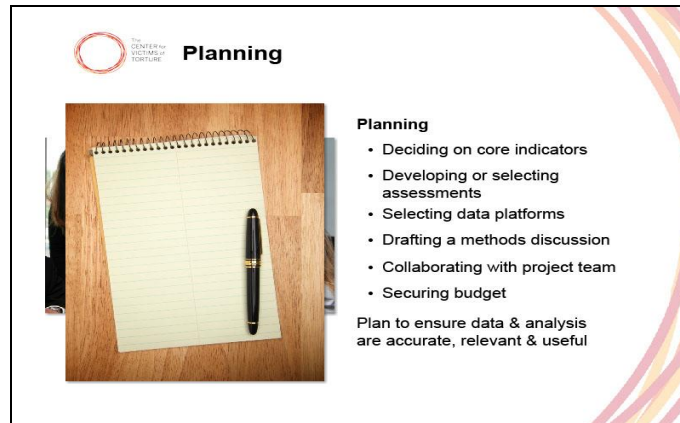


Slide 8 - Planning

Slide notes: Planning refers to all of the preparation and collaboration necessary to implement robust monitoring, evaluation, and (when appropriate), research.

Text Captions: Planning

Planning is all of the preparation and collaboration necessary to implement robust monitoring, evaluation, and (sometimes) research.



The slide features a logo for 'The CENTER for PROJECTS & TOOLS' in the top left corner. The main title 'Planning' is positioned to the right of the logo. Below the title is a photograph of a spiral-bound notebook with a pen resting on it, set against a wooden background. To the right of the image is a bulleted list of planning activities, followed by a concluding sentence. The slide is decorated with a colorful, curved graphic on the right side.

Planning

- Deciding on core indicators
- Developing or selecting assessments
- Selecting data platforms
- Drafting a methods discussion
- Collaborating with project team
- Securing budget

Plan to ensure data & analysis are accurate, relevant & useful

Slide 9 - Planning

Slide notes: Planning can include activities such as deciding on core indicators, developing or selecting assessments, selecting data platforms, drafting a methods discussion, collaborating with project team members to assign tasks, budget planning, and other activities.

Often organizations forego important steps in the planning phase. In response to time and other practical constraints, it is very tempting to rely on informal, ad-hoc planning or skip the planning phase entirely.

Another possible barrier to good planning practices can be a shortage of resources on planning within monitoring and evaluation literature, as compared with other PMER topics—a significant gap.

However, deliberate planning at the start of a project or program is always a good investment and is worth the challenge.

Planning helps ensure that the data you gather and the analyses you make based on that data are accurate, relevant, and useful to your organization's work.

Also, a good planning process can help communicate to others in your organization about the benefits and processes for gathering and evaluating data, which in turn can increase buy-in.

We will talk about this in greater depth in the PMER Basics Lesson on Planning.

Text Captions: Planning

Planning

Deciding on core indicators

Developing or selecting assessments

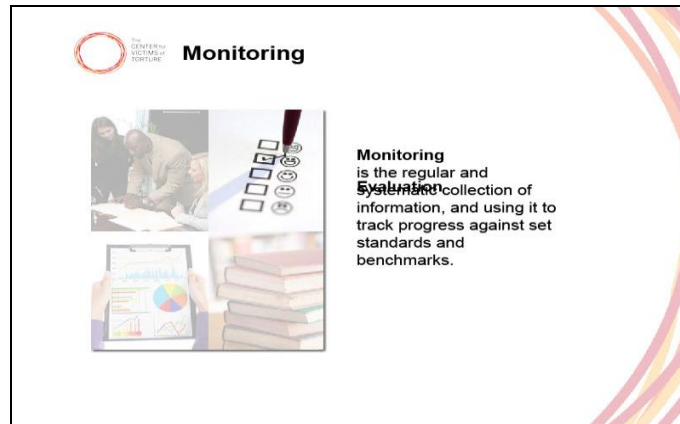
Selecting data platforms

Drafting a methods discussion

Collaborating with project team

Securing budget

Plan to ensure data & analysis are accurate, relevant & useful



Slide 10 - Monitoring

Slide notes: Many donors and organizations do not differentiate between the next two elements of PMER—monitoring and evaluation. These distinct activities are often referred to as simply “evaluation.”

However, each of these has a specific purpose and characteristics, so we will address them separately.

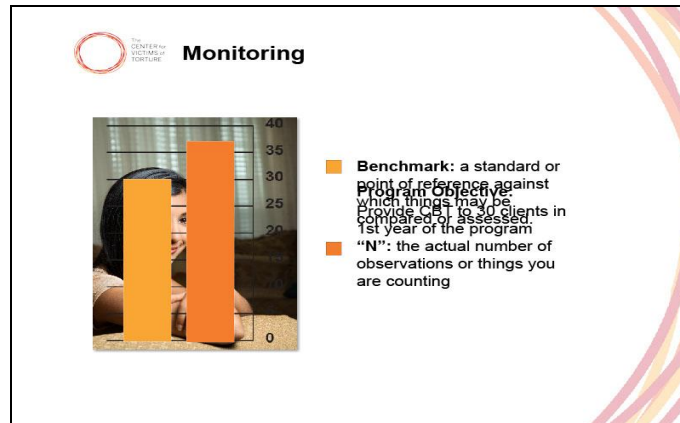
Monitoring is the regular and systematic collection of information, and use of that information to track progress against set standards and benchmarks.

In other words, monitoring is a strategy to track whether an intervention, program or organization is doing what it said it would do. Let’s take a look at an example.

Text Captions: Monitoring

Monitoring is the regular and systematic collection of information, and using it to track progress against set standards and benchmarks.

Evaluation



Slide 11 - Monitoring

Slide notes: Sara's organization is writing a grant proposal for a new treatment program. In the proposal, her organization says that the program will provide cognitive behavioral therapy (or CBT) to 30 individuals in the first year of the grant.

This is the benchmark, that is, the number the program aims to reach or surpass in the given time frame.

Once the organization learns that the project is funded, Sara and her colleagues carefully plan for how they will conduct the monitoring—what they will measure, and how they will collect the data.

Then, from the start of the program, they regularly and systematically collect data to track the program's progress against that benchmark.

Throughout this first year of the grant and the program, Sara's monitoring activity collects information about how many people receive CBT. At the end of the year Sara sees that 37 individuals have received CBT through the program in its first year.

She compares her "N" (that is, the number of actual clients counted) of 37 against her benchmark, which was 30. Sara and her organization can now report to their funder that the project has met and surpassed the benchmark!

In the PMER Basics lesson on Monitoring, we will look more in depth at how monitoring is done and how it can benefit your organization's work.

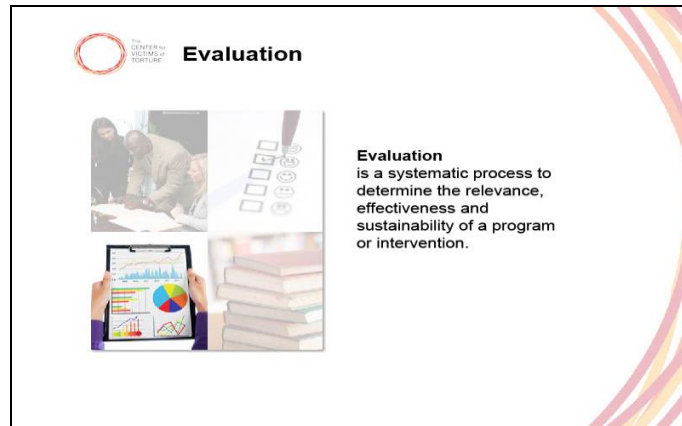
Text Captions: Monitoring

Program Objective:

Provide CBT to 30 clients in 1st year of the program

Benchmark: a standard or point of reference against which things may be compared or assessed.

"N": the actual number of observations or things you are counting

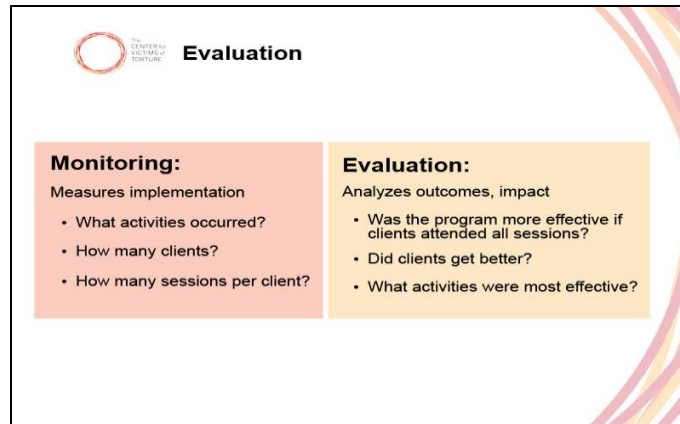


Slide 12 - Evaluation

Slide notes: Evaluation in the PMER context refers to a systematic process to determine the relevance, effectiveness and sustainability of a program or intervention.

Text Captions: Evaluation

Evaluation is a systematic process to determine the relevance, effectiveness and sustainability of a program or intervention.



Slide 13 - Evaluation

Slide notes: Recall that monitoring measures the implementation of a program or intervention.

Monitoring addresses questions such as, what activities took place, how many activities were performed, how many or what types of clients were served, how many sessions did each client attend, etcetera.

Evaluation analyzes the outcomes and impact. Evaluation asks more complicated questions, such as how useful or effective was the program or intervention.

Text Captions: Evaluation

Monitoring:

Measures implementation

What activities occurred?

How many clients?

How many sessions per client?

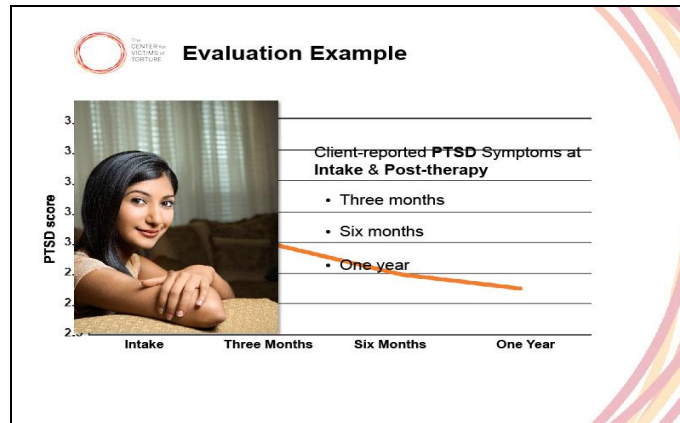
Evaluation:

Analyzes outcomes, impact

What activities were most effective?

Did clients get better?

Was the program more effective if clients attended all sessions?



Slide 14 - Evaluation Example

Slide notes: Returning to the example of Sara and her organization: monitoring provided information about the number of people who received Cognitive Behavioral Therapy, or CBT, in the first year of the project.

However, in evaluation, Sara wants to examine the value and effectiveness of the CBT—did the therapy actually help the clients?

One of the most common ways we do this is to measure the change in mental health symptoms. In this instance, Sara and her colleagues selected a questionnaire designed to measure PTSD symptoms. This questionnaire was completed with each client at intake.

Then, at the end of treatment, they followed up with the clients using the same questionnaire to measure PTSD symptoms post treatment.

Comparing these numbers for all 37 clients, Sara was able to gather information about the effectiveness of the CBT intervention.

This is information that is very valuable--to clinicians, program managers, current donors and potential donors.

Sara and her organization can now demonstrate that not only did they surpass their benchmark number of clients, the program was effective and helped reduce client symptoms.

As you can see, a systematic evaluation process can be a powerful tool to help your organization understand—and demonstrate to your supporters and funders—whether an intervention or program is valuable, useful or effective.

Text Captions: Evaluation Example

Intake

Three Months

Six Months

One Year

Client-reported PTSD Symptoms at Intake & Post-therapy

Three months

Six months



Slide 15 - Research

Slide notes: Research is a systematic method of collecting information to generate new and generalizable knowledge.

As with Monitoring and Evaluation, or M&E, Research involves systematic data collection and a systematic process of analysis to answer questions and enhance understanding.

Also, there are important core skills such as statistical analysis that are relevant to both M&E and Research. In fact, some people think of M&E as a subset of Research.

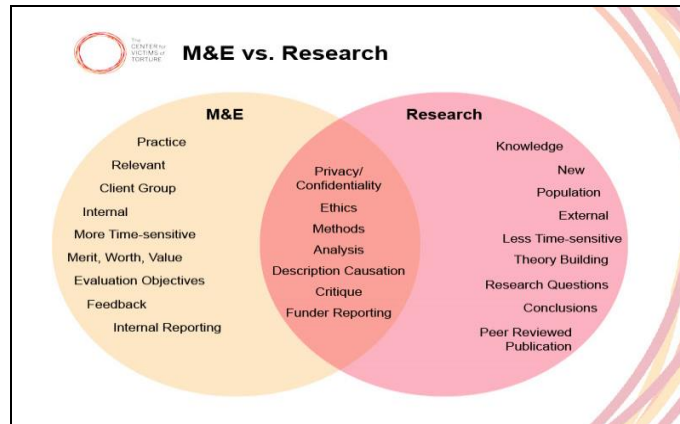
However, where monitoring and evaluation are generally concerned with a particular intervention, program or organization, research is investigation designed to advance knowledge in a broader sense.

For example, to increase understanding of a topic or issue within a field or discipline. Therefore, for our purposes, we think of Research and M&E as distinct practices that overlap.

Text Captions: Research

Research is a systematic method of collecting information to generate new and generalizable knowledge.

Applies to a broader field or discipline.



Slide 16 - M&E vs. Research

Slide notes: If we consider M&E and Research as distinct practices, then the better we understand the characteristics of each of these practices, the better we can clearly articulate, plan and execute them.

In this first sphere of practice we have M&E and some of its major concerns and characteristics. The second sphere of practice, shows the major concerns and characteristics of research.

As you can see, there is a significant area of overlap between these spheres.

Text Captions: M&E vs. Research

M&E Research

Practice Relevant

Client Group Internal

More Time-sensitive Merit, Worth, Value

Evaluation Objectives Feedback

Internal Reporting Privacy/Confidentiality

Ethics Methods

Analysis Description Causation

Critique Funder Reporting

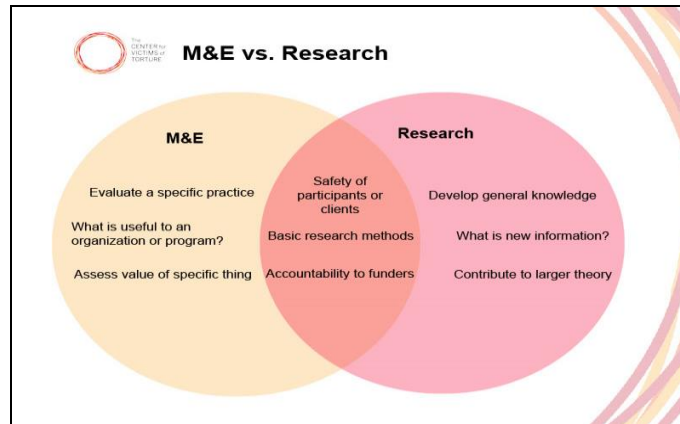
Knowledge New

Population External

Less Time-sensitive Theory Building

Research Questions Conclusions

Peer Reviewed Publication



Slide 17 - M&E vs. Research

Slide notes: We will return to this diagram in more detail in the PMER Basics lesson on Research, but the overall themes are: M&E is focused on measuring and evaluating a specific practice, whereas Research is focused on developing general knowledge.

M&E seeks to find what is useful to the organization or program, while Research is more concerned about developing new information to inform the field.

M&E strives to assess the value of something—a particular intervention or program within an organization, for example. Research is more concerned with contributing to a larger theory and body of knowledge across all organizations.

However, despite these distinctions M&E and Research share some core considerations and themes. For example, all of these practices share a fundamental concern for the safety of participants or clients; they are systematic and apply basic principles of research methods, and they can help address accountability to funders.

Text Captions: M&E vs. Research

M&E

Research

Evaluate a specific practice

What is useful to an organization or program?

Assess value of specific thing

Develop general knowledge

What is new information?

Contribute to larger theory

Safety of participants or clients

Basic research methods

Accountability to funders



Slide 18 - Bringing PMER Together

Slide notes: Now, let's take a look at how all of the elements of PMER come together. Planning is the foundation for all PMER.

In this stage, it is important to take the time to make deliberate, careful decisions and build consensus around how you will conduct your monitoring and evaluation or your research plan.

How well you do this will affect the quality and usefulness of both your data and analysis later.

At the end of the planning phase you should have the tools, systems, and team buy-in you need to begin monitoring—which lets us know if our planned activities are on track—and evaluation – which gives us information about the impact or value of our programs or interventions.

Finally, with a core of M&E systems and skills in place, we open up the opportunity to do research.

Research shares and builds on the methods, systems, and ethical consideration of M&E, but research has different goals and addresses a different type of question.

Text Captions: Bringing PMER Together

Measures implementation

Are planned activities on track?

Analyzes outcomes

What is the impact or value of our program?

Builds on M&E methods, systems and ethical considerations

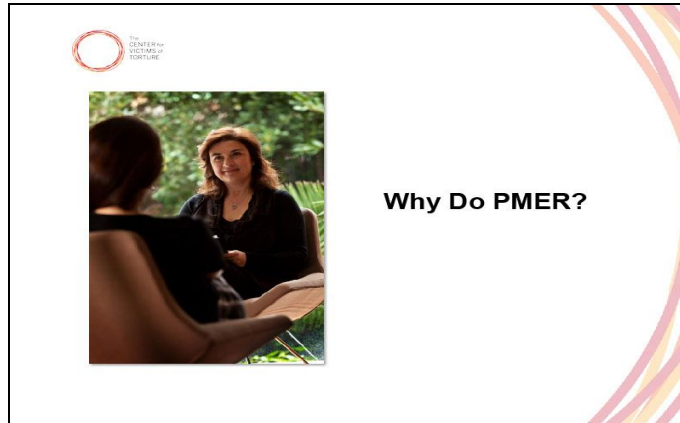
Addresses different set of goals, type of question

Research

Evaluation

Monitoring

Planning



Slide 19 - Why Do PMER?

Slide notes: Now that we have a shared, general understanding of what PMER is, let's talk about why PMER is important.

Text Captions: Why Do PMER?



Slide 20 - 5 Reasons

Slide notes: There are many reasons to do PMER and many ways in which it can help your organization. However, in this lesson we will focus on five core reasons to implement PMER processes.

Click each button to learn more, and when you are finished, click Continue

Text Captions: 5 Reasons To Do PMER

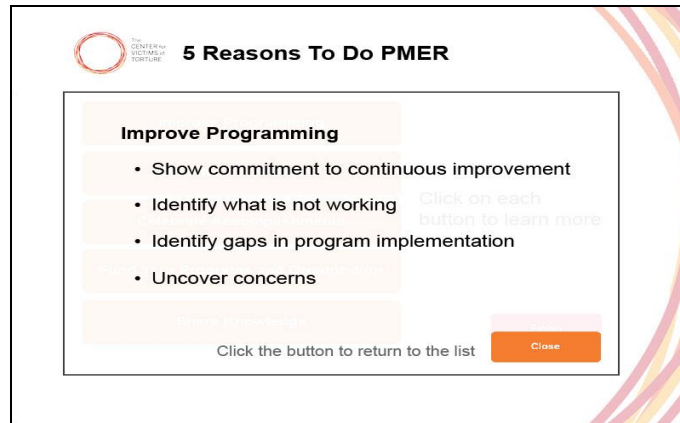
Click each button to learn more

Continue

Continue

Continue

When you are done, click the Continue button



Slide 21 - Improve Programming

Slide notes: Improve programming. Monitoring and evaluation can improve client care. Specifically, the thoughtful use of assessment and assessment data in treatment can support therapy and help improve client outcomes.

Instituting PMER also makes a strong statement to your funders, your staff, and even your beneficiaries.

It says that your organization wants to know how well its programs work, and that it is committed to continuous improvement.

Specifically, Monitoring and Evaluation allows you to identify components of projects that are not functioning well; identify gaps in program implementation; and uncover or address the concerns of team members or participants.

These are just a few examples, but overall, PMER can help you measure and evaluate your programs, which allows you to address potential issues and gives you valuable information for future programming.

Text Captions: 5 Reasons To Do PMER

Click on each button to learn more

Improve Programming

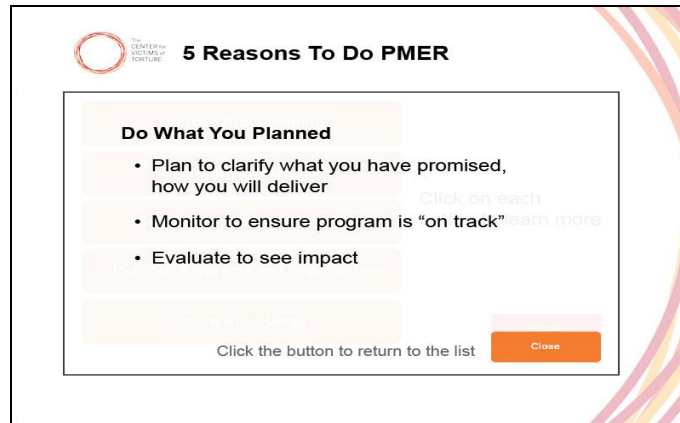
Show commitment to continuous improvement

Identify what is not working

Identify gaps in program implementation

Uncover concerns

Click the button to return to the list



Slide 22 - Do What You Planned

Slide notes: Do what you planned. PMER helps you and your organization be sure that what you actually do matches what you planned to do and stays aligned with your stated goals.

Specifically, the planning process clarifies what you have promised to donors, your organization and your beneficiaries; and how you will do what you have promised.

Continuous monitoring helps ensure that you are on track—that you are doing what you have planned. (After all, implementing what you have promised usually increases the likelihood that you will see the effects that you intended.)

Finally, evaluation allows you to see if the program has had the impact that you anticipated.

Text Captions: 5 Reasons To Do PMER

Click on each button to learn more

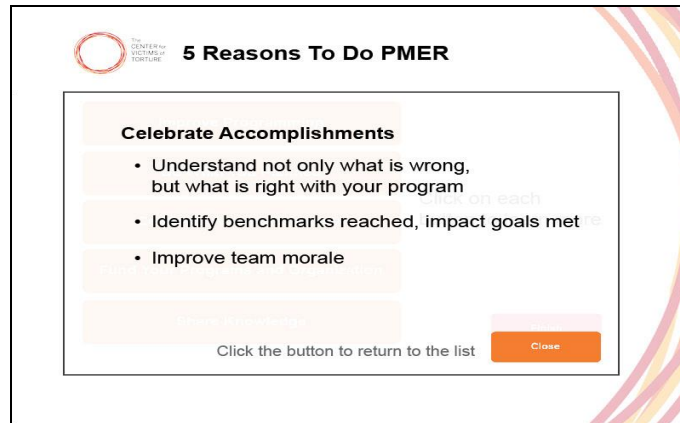
Do What You Planned

Plan to clarify what you have promised, how you will deliver

Monitor to ensure program is “on track”

Evaluate to see impact

Click the button to return to the list



Slide 23 - Celebrate Accomplishments

Slide notes: Celebrate accomplishments. Sometimes people perceive PMER as a set of tools to identify what is going wrong in a program. This can be an important function, but just as important: PMER can show you what going well in your program!

For example, maybe you saw or even surpassed the benchmark number of clients you planned to see. Or maybe post treatment assessments show a decrease in symptoms among nearly all of the clients.

Or maybe all of the clients in a therapy group have completed their cycle!

These are some of the types of successes that PMER can help you capture. The successes are reasons to celebrate, and communicating these successes improves team motivation and morale.

Text Captions: 5 Reasons To Do PMER

Click on each button to learn more

Celebrate Accomplishments

Understand not only what is wrong, but what is right with your program

Identify benchmarks reached, impact goals met

Improve team morale

Click the button to return to the list



Slide 24 - Fund Your Programs & Organization

Slide notes: Fund your programs and organization. PMER lets you demonstrate the quality and impact of your programs.

This is an important consideration for funders. In a proposal, funders view specific, data-supported statements much more favorably than vague, subjective claims.

For example, "Empirical data show that our clients experience a significant reduction in anxiety, depression and PTSD symptoms within three months of completing our intervention," is a much stronger statement than, "We believe our services improve client outcomes."

Also, more and more, funders around the world expect PMER to be a part of the projects they fund. If you have a strong, established PMER system and plan, your proposal will stand out from the other proposals.

In short, PMER makes your proposals more competitive, and that can mean more money to do the important work you do.

Text Captions: 5 Reasons To Do PMER

Click on each button to learn more

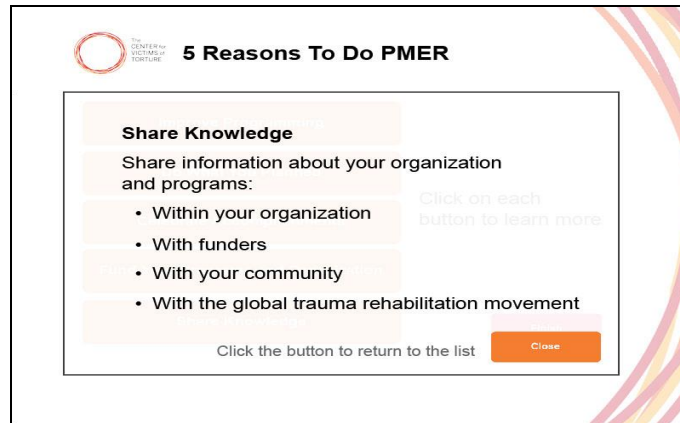
Fund Your Programs & Organization

Demonstrate quality & impact of programs

Meet funder expectations for PMER

Make proposals more attractive; good empirical support may help gain funding

Click the button to return to the list



Slide 25 - Share Knowledge

Slide notes: Share knowledge. As professionals working in trauma rehabilitation centers, we believe in our work. What's more, it is essential to the global trauma rehabilitation movement that we share what we know and what we have learned from our work.

PMER provides you with the evidence and support you need to share information about your organization and its programs with other people within your organization, with funders, with your local or national community, and with others in the global trauma rehabilitation movement.

You can use PMER data and findings in reports, newsletters, social media, articles, peer reviewed journals and more! Increasingly, the world speaks the language of data and research.

PMER helps you speak that language, tell compelling stories about your work, and engage in new areas of conversation.

Text Captions: 5 Reasons To Do PMER

Click on each button to learn more

Share Knowledge

Share information about your organization and programs:

Within your organization

With funders

With your community

With the global trauma rehabilitation movement

Click the button to return to the list



Slide 26 - 5 Reasons

Slide notes: There are many reasons to do PMER and many ways in which it can help your organization. However, in this lesson we will focus on five core reasons to implement PMER processes.

Text Captions: 5 Reasons To Do PMER

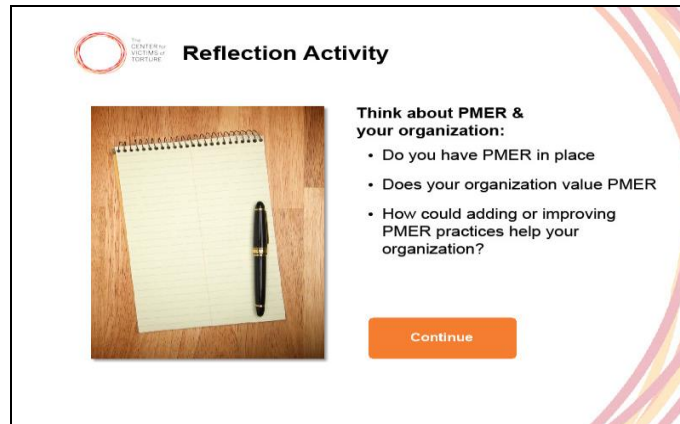
Click each button to learn more

When you are done, click the Continue button

Continue

Continue

Continue

The slide is titled "Reflection Activity" and features a logo for "THE CENTER FOR THE STUDY OF TORTURE" in the top left corner. On the left side, there is a photograph of a spiral-bound notebook with a pen resting on it. To the right of the notebook, the text reads "Think about PMER & your organization:" followed by a bulleted list of three questions. At the bottom right, there is an orange button labeled "Continue".

Reflection Activity

THE CENTER FOR THE STUDY OF TORTURE

Think about PMER & your organization:

- Do you have PMER in place
- Does your organization value PMER
- How could adding or improving PMER practices help your organization?

Continue

Slide 27 - Reflection Activity

Slide notes: Think now about PMER and its role in your organization. Does your organization currently have PMER practices in place? If so, what kind of value does your organization place on PMER?

Are there ways in which adding PMER or improving PMER practices you already have could benefit your organization?

Take a moment now to reflect on these questions and your organization's relationship with PMER. Write down some of your thoughts in your notebook or paper. When you are finished, click continue.

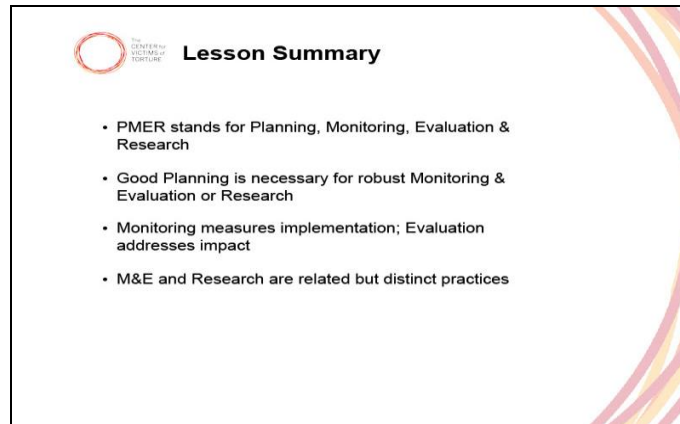
Text Captions: Reflection Activity

Think about PMER & your organization:

Do you have PMER in place

Does your organization value PMER

How could adding or improving PMER practices help your organization?

The slide features a logo for 'THE CENTER FOR COMMUNITY TOURISM' in the top left corner, consisting of a circular icon and the text. The title 'Lesson Summary' is positioned to the right of the logo. A list of four bullet points is centered on the slide. The right side of the slide is decorated with a graphic of overlapping, curved lines in shades of pink, orange, and yellow.

Lesson Summary

- PMER stands for Planning, Monitoring, Evaluation & Research
- Good Planning is necessary for robust Monitoring & Evaluation or Research
- Monitoring measures implementation; Evaluation addresses impact
- M&E and Research are related but distinct practices

Slide 28 - Lesson Summary

Slide notes: In summary: PMER stands for Planning, Monitoring, Evaluation and Research.

Good planning is the necessary foundation for robust Monitoring and Evaluation or Research activities.

Monitoring measures implementation; Evaluation addresses quality or impact.

M&E and Research are related but distinct practices.

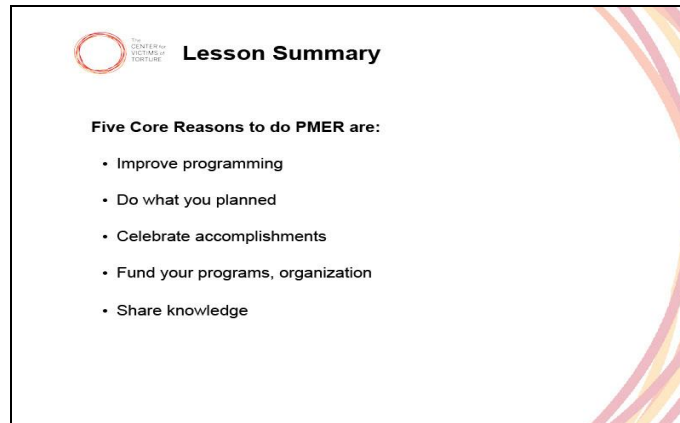
Text Captions: Lesson Summary

PMER stands for Planning, Monitoring, Evaluation & Research

Good Planning is necessary for robust Monitoring & Evaluation or Research

Monitoring measures implementation; Evaluation addresses impact

M&E and Research are related but distinct practices



Slide 29 - Lesson Summary

Slide notes: The five core reasons to do PMER are: to improve programming; to ensure you do what you have planned; to celebrate accomplishments; to help secure funding for your programs and your organization; and to share knowledge within your organization, your community and the global trauma rehabilitation movement.

Text Captions: Lesson Summary

Five Core Reasons to do PMER are:

Improve programming

Do what you planned

Celebrate accomplishments

Fund your programs, organization

Share knowledge