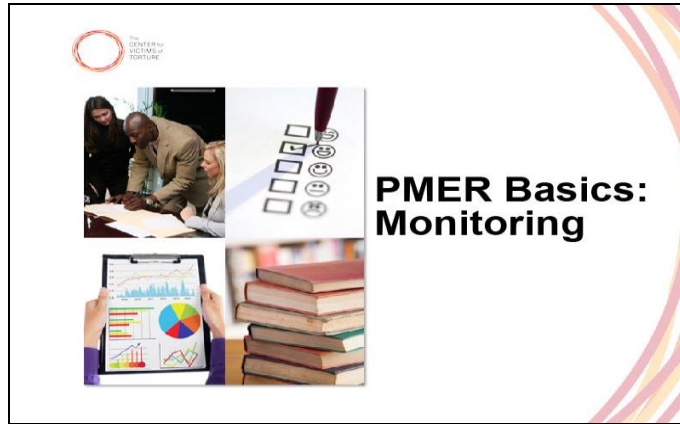


Slide 1 - Curriculum Title

Text Captions: Capacity Building Curriculum

Monitoring and Evaluation

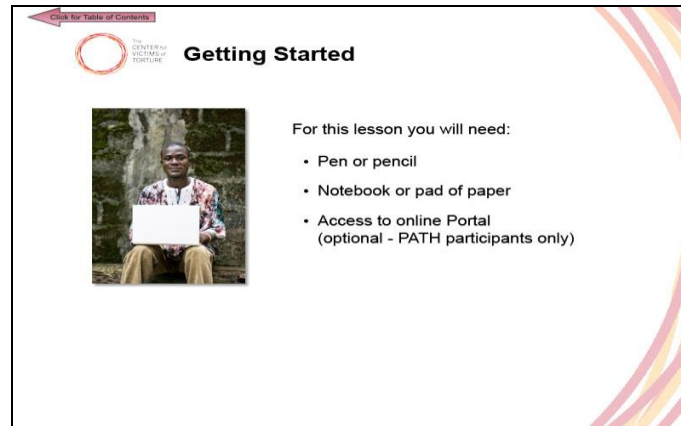
Music: Sweet - Bensound.com



Slide 2 - Lesson Welcome

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

Text Captions: PMER Basics: Monitoring

The slide is titled "Getting Started" and features a logo for "The Center for Victims of Torture" in the top left corner. A red arrow points to a "Click for Table of Contents" link. Below the logo is a photograph of a man in a patterned shirt holding a white sign. To the right of the photo, the text reads "For this lesson you will need:" followed by a bulleted list: "• Pen or pencil", "• Notebook or pad of paper", and "• Access to online Portal (optional - PATH participants only)". The slide has a decorative curved border on the right side with pink, orange, and yellow stripes.

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.

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Text Captions: Getting Started

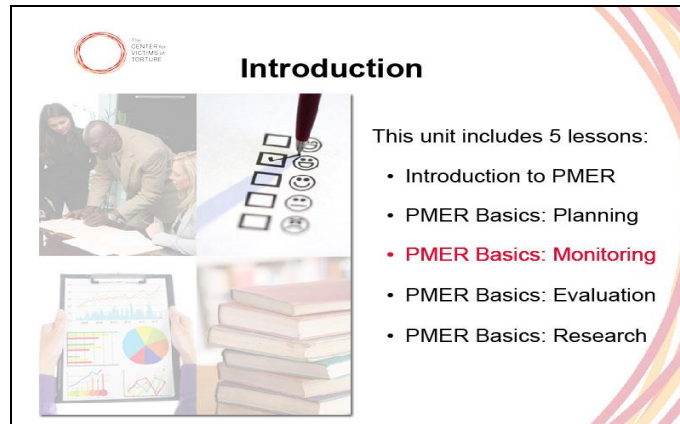
For this lesson you will need:

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: 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.

The five lessons in the PMER Basics Unit are designed to help us develop a shared understanding of the basic PMER principles, purposes and processes.

In this, the third lesson in the unit, we will delve deeper into the M component of PMER – Monitoring. We will take a closer look at what monitoring is, how it relates to other components of PMER, and why it matters.

Text Captions: Introduction

This unit includes 5 lessons:

Introduction to PMER

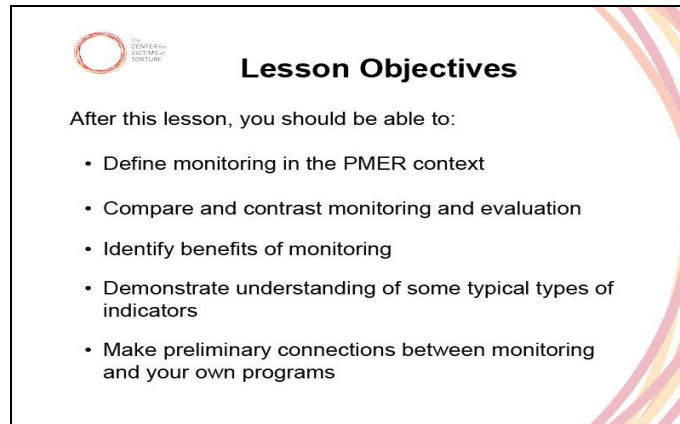
PMER Basics: Planning

PMER Basics: Monitoring

PMER Basics: Evaluation

PMER Basics: Research

PMER Basics: Monitoring



The slide features a logo for 'THE CENTER OF DISTANCE EDUCATION' in the top left corner. The main title is 'Lesson Objectives'. Below the title, it states 'After this lesson, you should be able to:' followed by a bulleted list of five objectives. The slide has a decorative border on the right side with curved lines in shades of pink, orange, and yellow.

Lesson Objectives

After this lesson, you should be able to:

- Define monitoring in the PMER context
- Compare and contrast monitoring and evaluation
- Identify benefits of monitoring
- Demonstrate understanding of some typical types of indicators
- Make preliminary connections between monitoring and your own programs

Slide 5 - Lesson Objectives

Slide notes: After this lesson, you should be able to:

- Give a basic definition of Monitoring in the PMER context;
- Compare and contrast monitoring and evaluation—describing what they have in common and how they are distinct from one another;
- Identify some of the benefits of monitoring;
- Demonstrate a basic understanding of what elements of a program and what types of indicators are typically monitored; and
- Make preliminary connections between the Monitoring and your own programming.

Text Captions: Lesson Objectives

After this lesson, you should be able to:

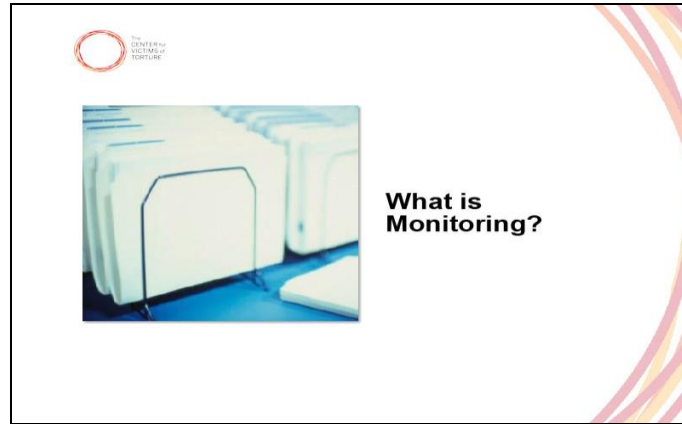
Define monitoring in the PMER context

Compare and contrast monitoring and evaluation

Identify benefits of monitoring

Demonstrate understanding of some typical types of indicators

Make preliminary connections between monitoring and your own programs

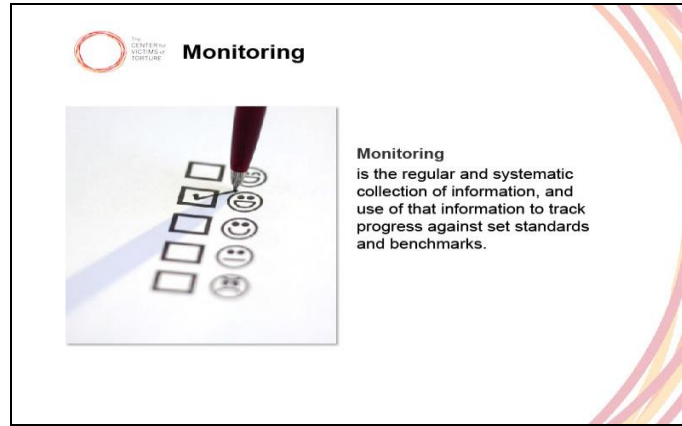


Slide 6 - What is Monitoring?

Slide notes: In the Introduction to PMER lesson, we mentioned that some people do not differentiate between monitoring and evaluation, and refer to them together as simply “evaluation.” However, we will approach these as two distinct activities.

Let’s begin by developing a good understanding of what monitoring is and the ways in which it is similar to—and different from—evaluation.

Text Captions: What is Monitoring?

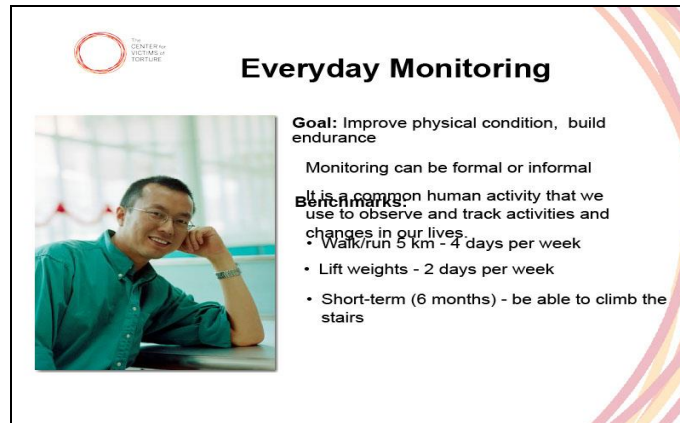


Slide 7 - Monitoring

Slide notes: Monitoring is the regular and systematic collection of information, and use of that information to track progress against set standards and benchmarks. Monitoring tracks whether an intervention, program or organization is doing what it said it would do.

Text Captions: Monitoring

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



Everyday Monitoring

Goal: Improve physical condition, build endurance

Monitoring can be formal or informal

It is a common human activity that we use to observe and track activities and changes in our lives.

Benchmarks:

- Walk/run 5 km - 4 days per week
- Lift weights - 2 days per week
- Short-term (6 months) - be able to climb the stairs

Slide 8 - Everyday Monitoring

Slide notes: Formally or informally, we monitor every day. At a very basic level, monitoring is just a common, human activity by which we observe and keep track of activities, circumstances and changes in our lives.

As an example of this kind of daily, personal monitoring, consider Phil.

Twice a year, Phil has an appointment with a doctor whose office is on the fourth floor of an old office building. There is no lift, so he climbs four flights of stairs each time he has an appointment. But this time, Phil notices something.

Phil: “Wow. I am really exhausted! I can’t breathe well, my legs are tired. Climbing stairs used to be so easy—when did I get so unfit?”

At this point, Phil decides to set a goal: to get fit—that is, to improve his physical condition and endurance. But how will he do this? Phil sets some benchmarks for himself:

Phil: “Okay, I am going to walk or run five kilometers 4 days each week, and I am going to lift weights two days a week. Six months from now when I come back here, I should be able to walk up these stairs without any trouble!”

Almost every week, Phil takes note of whether he is meeting those weekly benchmarks, and how well he is progressing toward his goal.

Phil: “Hmm. I did not lift weights today like I planned, so that means I only did it once this week, and I missed a day last week too. But on a positive note, I did do my 5 kilometers four days this week, and I am now able to run more than I walk, so I think

I’m getting stronger!”

After six months of running and lifting weights and monitoring his progress against his benchmarks, Phil returns to his doctor’s office. He finds that now, not only can he climb the four flights of stairs without pain or breathing trouble, he can run up the stairs!

Phil has achieved—even surpassed—his short-term goal on his journey to getting healthy and “fit.”

Text Captions: Everyday Monitoring

Monitoring can be formal or informal

It is a common human activity that we use to observe and track activities and changes in our lives.

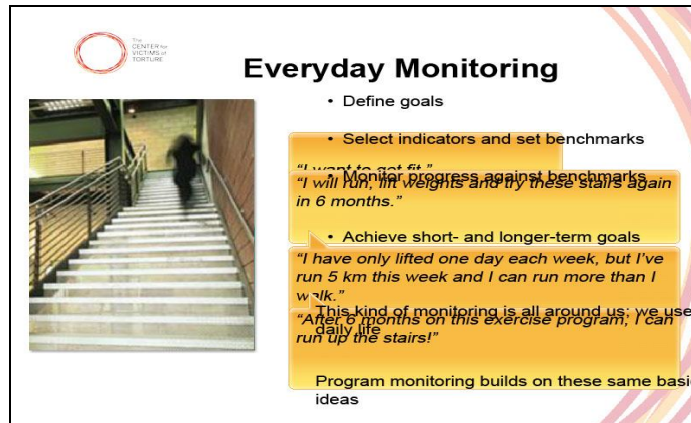
Goal: Improve physical condition, build endurance

Benchmarks:

Walk/run 5 km - 4 days per week

Lift weights - 2 days per week

Short-term (6 months) - be able to climb the stairs



Slide 9 - Everyday Monitoring

Slide notes: This is the basic idea of monitoring: We make goals,

Phil: "I want to get fit!"

Select indicators and set benchmarks,

Phil: "I will run and lift weights, and try these stairs again in 6 months."

and check our progress against those benchmarks.

Phil: "I have only lifted one day each week, but I have done 5 kilometers this week as planned, and I am able to run more than I walk."

Which hopefully helps us achieve short and long term goals

Phil: "After six months on this exercise program, I can run up the stairs!"

We do this type of everyday monitoring all the time—when we take a class, learn a new language, start a new job—any time we work toward a goal.

This kind of monitoring has become so common that an increasing number of businesses and technologies have developed to offer ordinary people ways to quantitatively monitor everyday things like diet, exercise, household budgets and more.

In the monitoring and evaluation of programs, we build on these same basic ideas to track and measure the implementation of programs.

Text Captions: Everyday Monitoring

Define goals

"I want to get fit."

Select indicators and set benchmarks

"I will run, lift weights and try these stairs again in 6 months."

Monitor progress against benchmarks

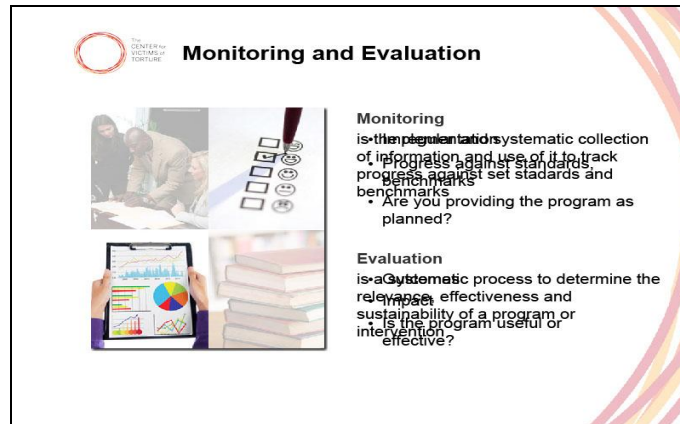
"I have only lifted one day each week, but I've run 5 km this week and I can run more than I walk."

Achieve short- and longer-term goals

“After 6 months on this exercise program, I can run up the stairs!”

This kind of monitoring is all around us; we use it in daily life

Program monitoring builds on these same basic ideas



Slide 10 - Monitoring & Evaluation

Slide notes: Remember that monitoring and evaluation are very closely connected and often work together; however, each of these distinct activities has a specific purpose and set of characteristics.

At a broad level, monitoring measures the implementation of a program or intervention. It tracks progress against set standards and benchmarks. Evaluation assesses outcomes and impacts of a program or intervention.

In other words monitoring tells you if you are providing the program as you planned to provide it; evaluation tells you whether that program is useful or effective. Let's look at an example that illustrates this interconnection.

Text Captions: Monitoring and Evaluation

Monitoring

Evaluation

is the regular and systematic collection of information and use of it to track progress against set standards and benchmarks

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

Progress against standards, benchmarks

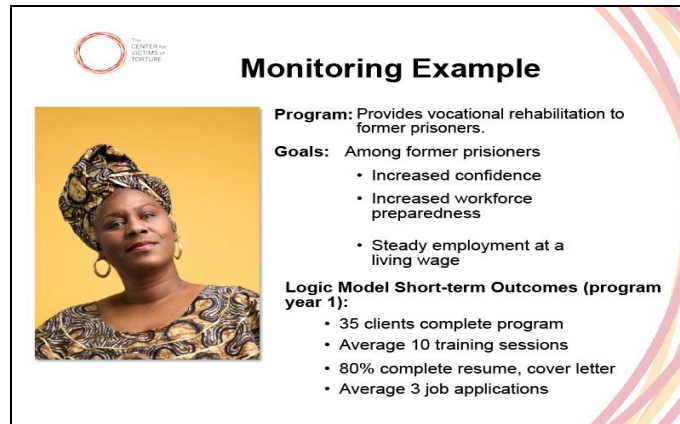
Are you providing the program as planned?

Implementation

Outcomes

Impact

Is the program useful or effective?



Monitoring Example

Program: Provides vocational rehabilitation to former prisoners.

Goals: Among former prisoners

- Increased confidence
- Increased workforce preparedness
- Steady employment at a living wage

Logic Model Short-term Outcomes (program year 1):

- 35 clients complete program
- Average 10 training sessions
- 80% complete resume, cover letter
- Average 3 job applications

Slide 11 - Monitoring: Example

Slide notes: Naila is the M&E officer for a program that provides vocational rehabilitation to former prisoners. The objectives or goals of this program are to help former prisoners prepare for the workforce and secure stable employment that provides a living wage.

To monitor the program, Naila needs to track the program's progress against set standards and benchmarks. So what does that look like?

Because they are committed to using good PMER practices, Naila and the program team followed a careful planning process to define the program before they implemented it.

They conducted a needs assessment, created a logic model, and wrote their M&E plan. This means that Naila has a clear description of what the program intends to do.

Based on the logic model and M&E plan, Naila knows that the planned short term outcomes—that is, outcomes for the first year of the program in this case—include:

- 35 clients graduate from the program;
- On average, each client attends at least 10 vocational training sessions;
- At least 80% of the clients develop a resumé and a general cover letter; and
- Clients apply for an average of at least three jobs.

These will serve as the benchmarks for Naila's monitoring work.

Text Captions: Monitoring Example

Program:

Provides vocational rehabilitation to former prisoners.

Goals:

Among former prisoners

Increased confidence

Increased workforce preparedness

Steady employment at a living wage

Logic Model Short-term Outcomes (program year 1):

35 clients complete program

Average 10 training sessions

80% complete resume, cover letter

Average 3 job applications

Indicator	Benchmark	Actual Result
• Number of clients graduated	• 35 clients	• 24 clients
• Average number of vocational training sessions attended	• 10 (average)	• 15.2 (average)
• Percent of clients with completed resume and cover letter	• 80% completed	• 100% completed
• Average number of job applications submitted	• 3 (average)	• 10.1 (average)

"How can we increase the number of clients who graduate?"

Slide 12 - Monitoring: Example

Slide notes: Over the course of that first year, Naila and the team carefully measure and track the indicators—number of clients who complete the program, vocational training attendance per client, number of client resumés and cover letters completed, and number of job applications per client.

At the end of the year, Naila can see that: 24 clients completed the program; on average, clients attended 15.2 vocational training sessions; all of the clients completed a resumé and cover letter; and on average, clients submitted 10.1 job applications.

Based on these results, what can Naila say about this program?

First, if the program is going to meet its benchmarks, they will need to see more clients—the goal was 35, and the actual number was 24—only about 2/3 the goal.

However, among this smaller number of clients, other benchmarks, were met and surpassed:

clients attended even more vocational training sessions than planned; all clients have a resumé and cover letter as compared with the 80% benchmark; and on average, clients applied for more than 3 times as many jobs as initially planned.

As the M&E officer, Naila wants to be sure to regularly engage with the team. She communicates these monitoring results with the team, so that they can consider strategies for meeting or adjusting benchmarks.

For example, the team might consider questions like, “Why do we think we didn’t have as many clients as anticipated? How can we increase this number?”

Within our client community, is it realistic to think we can increase this number, or do we need to adjust our expectations and benchmarks?”

Text Captions: Monitoring: Example

Benchmark

Indicator

Actual Result

Number of clients graduated

Average number of vocational training sessions attended

Percent of clients with completed resume and cover letter

Average number of job applications submitted

35 clients

10 (average)

80% completed

3 (average)

24 clients

15.2 (average)

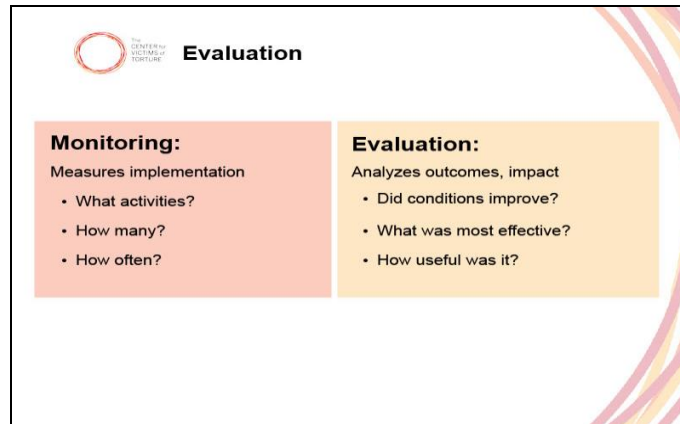
100% completed

10.1 (average)

“Why didn’t we reach the benchmark?”

“How can we increase the client numbers to meet benchmarks?”

“Is the benchmark realistic?”



Slide 13 - Evaluation

Slide notes: Remember, monitoring looks at indicators, or specific measures, that are used to assess whether a program is administered as it was planned. It answers questions like what, how many, and how often.

By contrast, evaluation speaks to the broader goal of the program.

It examines indicators that reflect why the program exists and whether it is meaningful and valuable—questions like, did client outcomes improve, what activities were most effective, how useful was the program.

So, how would this example be different if viewed from an evaluation perspective? We take a deeper look at evaluation in the next lesson in this unit, but to help illustrate the distinctions between monitoring and evaluation, let's continue with Naila's example.

Text Captions: Evaluation

Monitoring:

Measures implementation

What activities?

How many?

How often?

Evaluation:

Analyzes outcomes, impact

Did conditions improve?

What was most effective?

How useful was it?

Monitoring vs. Evaluation: Example

Program: Provides vocational rehabilitation to former prisoners.

Goals: Among former prisoners

- Increased confidence
- Increased workforce preparedness
- Steady employment at a living wage

Short-term Outcomes (program year 1) and Monitoring Benchmarks:

- 35 clients complete program
- ✓ Average 10 training sessions
- ✓ 80% complete resume, cover letter
- ✓ Average 3 job applications

Slide 14 - Monitoring vs. Evaluation Example

Slide notes: In Naila’s example, the program met or surpassed some key monitoring benchmarks—the benchmarks for number of training sessions attended and percentage of resumés written.

And, as we have discussed, each of those benchmarks and indicators is related to one of the program’s short term outcome goals.

However, the overall goal of the program is not simply to have people attend training sessions or write resumés—the broader goal of the program to increase job readiness among the clients and, ultimately, have them find jobs.

Reaching monitoring benchmarks, and achieving short term outcomes are steps along the way toward the broader program goals.

This is where evaluation comes in: where monitoring tracks key program activities, evaluation determines whether broader objectives are achieved, which helps assess the value of the program. So what does that mean for Naila’s program?

Text Captions: Monitoring vs. Evaluation: Example

Program:

Provides vocational rehabilitation to former prisoners.

Goals:

Among former prisoners

Increased confidence

Increased workforce preparedness

Steady employment at a living wage

Short-term Outcomes (program year 1) and Monitoring Benchmarks:

35 clients complete program

Average 10 training sessions

80% complete resume, cover letter

.....

Long-term Outcomes (from logic model)	How this is Measured	End of Program Evaluation Results
<ul style="list-style-type: none"> Increased client confidence/perception of work readiness Increase in client's job skills, behaviors and other workplace readiness measures Clients secure and retain employment 	<ul style="list-style-type: none"> Client intake and post-intervention surveys (self reporting) Pre- and post-intervention testing (objective assessment) Count of clients employed (objective assessment) 	<ul style="list-style-type: none"> Statistically significant increases in confidence 35.6% of clients show increases in workplace readiness 87.5% of 1st year clients (N=21) find, retain employment for at least 6 mos.

Slide 15 - Monitoring vs Evaluation: Example

Slide notes: Looking back to the program logic model and M&E plan, Naila examines the objectives and goals for the program, also called the long-term outcomes.

The three main outcomes identified in the planning process were:

- Clients have greater confidence in their ability to secure, perform and maintain work;
- Increase in clients' job skills, behaviors and other workplace readiness measures; and
- Clients secure employment.

Work readiness and secured employment will be measured through objective assessment, client confidence will be self-reported in a survey, comparing pre-program responses with responses at the end of the program.

At the end of the program, analysis of the client surveys shows a significant increase in self-reported confidence. The pre- and post-intervention job readiness assessments show an overall 35.6% increase in work readiness.

And, finally, 87.5% of those 21 clients served in the first year of the program secured employment and have been in their jobs for at least 6 months.

Text Captions: Monitoring vs. Evaluation: Example

How this is Measured

Long-term Outcomes

(from logic model)

End of Program Evaluation Results

Increased client confidence/ perception of work readiness

Increase in client's job skills, behaviors and other workplace readiness measures

Clients secure and retain employment

Client intake and post intervention surveys (self reporting)

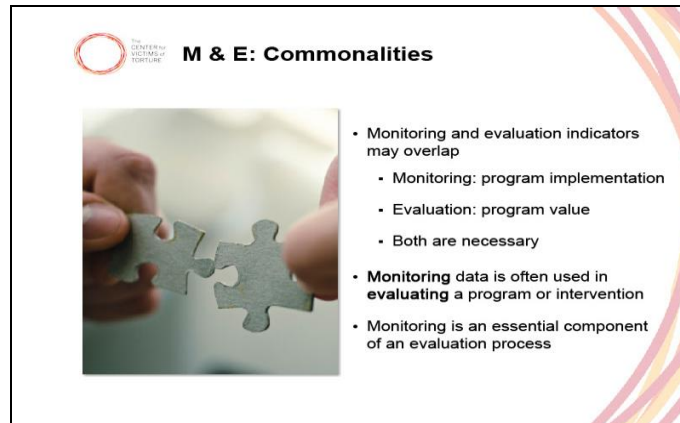
Pre- and post-intervention testing (objective assessment)

Count of clients employed (objective assessment)

Statistically significant increases in confidence

35.6% of clients show increases in workplace readiness

87.5% of 1st year clients (N=21) find, retain employment for at least 6 mos.



M & E: Commonalities

- Monitoring and evaluation indicators may overlap
 - Monitoring: program implementation
 - Evaluation: program value
 - Both are necessary
- **Monitoring** data is often used in **evaluating** a program or intervention
- Monitoring is an essential component of an evaluation process

Slide 16 - M & E Commonalities

Slide notes: All these differences between monitoring and evaluation aside, there are also several areas of commonality and potential overlap.

For example, the number of clients graduated and resumés submitted through the program were listed as monitoring indicators. However, we could also make a case for these indicators as a part of evaluation.

There is often potential overlap between monitoring and evaluation in this way. The key points to remember are that monitoring tracks program implementation, while evaluation assesses the value of a program.

Also, remember that you need both monitoring and evaluation to fully understand the actual implementation and the effectiveness of the program.

For example, if Naila's program planned to see 1000 clients over the life of the program, but it only saw eight clients, even if everyone of those eight individuals were more confident, better prepared for the workforce and steadily employed at the end

of the program, it is unlikely the program would be called a success overall. We often—almost always—use monitoring data in the evaluation of a program or intervention. Monitoring is an essential and often overlapping component of evaluation.

Text Captions: M & E: Commonalities

Monitoring and evaluation indicators may overlap

Monitoring data is often used in evaluating a program or intervention

Monitoring is an essential component of an evaluation process

Monitoring: program implementation

Evaluation: program value

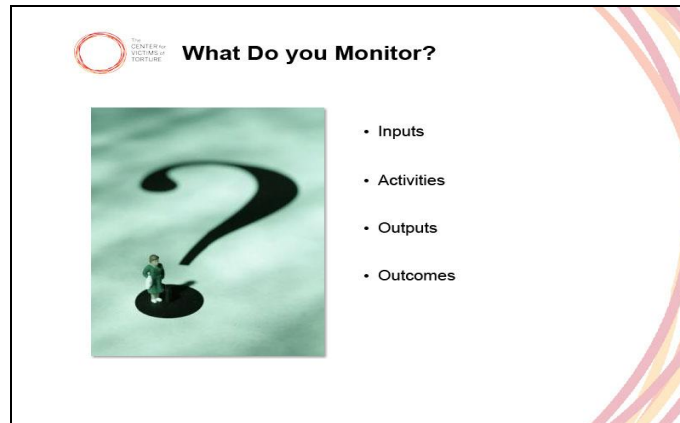
Both are necessary



Slide 17 - What to Monitor

Slide notes: Now that we've addressed what monitoring is and clarified its relationship with evaluation, we will look a little deeper into what it is that we monitor.

Text Captions: What to Monitor



Slide 18 - What Do You Monitor?

Slide notes: Let's consider four specific categories of things you might monitor: inputs, activities, outputs, and outcomes.

You may remember from the PMER Basics: Planning lesson that these four categories are some of the key components of logic models and pathway models.

If you have developed your program theory or logic in this way, you already have an indication of what elements you should track throughout the project.

Text Captions: What Do you Monitor?

Inputs

Activities

Outputs

Outcomes

What to Monitor: Inputs

Inputs that are easily tracked without data are not monitored

- Not usually the focus of monitoring, however, under some conditions, it may be appropriate to monitor an input
- Examples of inputs:
 - Cooperation among program staff to develop and use indicators
 - Appropriate forms and client charts
 - 3 private rooms for therapy

Slide 19 - Inputs

Slide notes: Inputs are the resources that are needed to implement a program. Inputs are not usually the focus of monitoring, and are not included in most monitoring systems. That said, there are times when indicators related to inputs may be relevant for monitoring.

Imagine, for example, that the planning process for a psychosocial program identified inputs such as:

- Five full-time psychotherapists
- Appropriate forms and charts for clients,
- Three private rooms for counseling sessions
- And several other resources.

Typically an evaluation plan would not include monitoring: the number of staff on a project, the number of rooms used, or form availability. In most programs, once elements like staff, facilities and forms are in place,

they are relatively stable and can easily be monitored without data. However, there are circumstances in which monitoring and evaluation might track these inputs.

For example, if this psychosocial program were opening in a large hospital, availability and access to rooms could serve as an indicator of integration and growth of the program within the hospital setting.

Similarly, in a very large, complex program that requires many types of forms, it may be useful to monitor development and implementation of the forms.

Remember, it is very important to work with program staff during planning and early in the monitoring process to determine and confirm the proper indicators.

For some projects, a program manager might define monitoring inputs as simply project tasks not included in monitoring.

In other circumstances, the team may feel that these elements need to be tracked quantitatively through monitoring, as a formal M&E component.

It is essential that the larger team is in agreement on this, and that these conversations occur when you plan for monitoring.

Text Captions: What to Monitor: Inputs

Inputs

are the resources needed to implement a program

Not usually the focus of monitoring

Some may be relevant

Examples of inputs:

5 psychotherapists

Appropriate forms and client charts

3 private rooms for therapy

Inputs that are easily tracked without data collection are not monitored

However, under some conditions, it may be appropriate to monitor an input

Cooperation among program staff to define and confirm indicators



What to Monitor: Activities

Activities are the actual things your staff/programs do, the active mechanisms

Activities are the primary elements to be monitored

Slide 20 - Activities

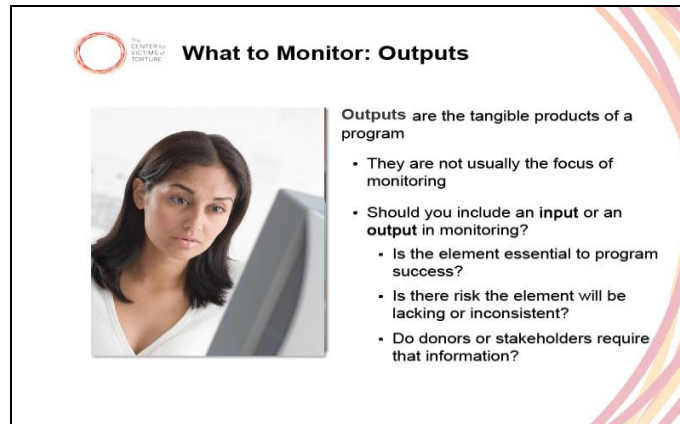
Slide notes: Activities are the things that you do in your program. In a trauma rehabilitation program, these might include things like providing a certain number of group therapy sessions, providing auxiliary services such as social work services, and staff capacity building.

Activities are at the core of monitoring. They are the active mechanisms by which a program works to meet its goals. Therefore, monitoring activities helps ensure a successful implementation.

Text Captions: What to Monitor: Activities

Activities are the primary elements to be monitored

Activities are the actual things your staff/programs do, the active mechanisms



What to Monitor: Outputs

Outputs are the tangible products of a program

- They are not usually the focus of monitoring
- Should you include an **input** or an **output** in monitoring?
 - Is the element essential to program success?
 - Is there risk the element will be lacking or inconsistent?
 - Do donors or stakeholders require that information?

Slide 21 - Outputs

Slide notes: Outputs are the tangible products of a program. In a trauma rehabilitation center, these might include items like completed client charts, referral documentation, or consent-for-treatment forms.

Again, as with inputs, outputs may be monitored or not. Whether they should be depends on the details of the program. It is at the discretion of the team or organization to decide which outputs will be monitored.

How do you know whether to measure an input or output within monitoring? Consider the following questions:

Is the item essential for program success? If the component is essential, it may be something that you should consider monitoring. If a component is essential, the intervention is unlikely to be successful without it.

Is there a risk that the element will be lacking or inconsistent? If so, you might consider monitoring the component because it is a likely source of variability or shortcoming in the implementation.

Monitoring could help quickly bring attention to any gaps that may occur.

Do your donors or other stakeholders want this information? If so, you probably should consider monitoring the component to comply with those requirements that could affect future support of the program.

Text Captions: What to Monitor: Outputs

Outputs are the tangible products of a program

They are not usually the focus of monitoring

Should you include an input or an output in monitoring?

Is the element essential to program success?

Is there risk the element will be lacking or inconsistent?

Do donors or stakeholders require that information?

What to Monitor: Outcomes

Remember: are impacts or changes anticipated as result of a program

- Short-term outcomes: often more tangible, finite, more easily measured
- Example:
 - Short-term outcome: increase client retention in second half of cycle
- Mid-term outcomes: more substantial goals
- What to monitor for each client:
 - Number of sessions scheduled
 - Number of sessions completed
- Long-term outcomes: major program objectives
- Monitoring information will be used in evaluation

Slide 22 - Outcomes

Slide notes: Finally, Outcomes are the changes anticipated as a result of the program. In a trauma rehabilitation program, these might include things like:

- reduction in PTSD symptoms,
- increases in social functioning, or, simply,
- increasingly consistent attendance for appointments.

Generally, the measurement of outcomes is more associated with evaluation. However, within outcomes, there may be some overlap in monitoring and evaluation.

For example, if a program has a short term outcome of increasing the client retention in the second half of the treatment cycle, we could monitor the number of sessions scheduled, and the number of sessions completed for each client.

We would then use that information in our evaluation to see, over time, if there was an increase in the percentage of clients who continued to attend their scheduled sessions through the second half of the treatment cycle.

Here again, monitoring and evaluation overlap, but they are still distinct undertakings with distinct purposes.

As you may recall, in the PMER Planning lesson, we discussed that programs often have short-term, mid-term and long-term outcomes. From a monitoring and evaluation perspective, short-term outcomes tend to be more tangible and are generally suitable for monitoring.

Mid-term outcomes tend to be more substantial goals in the project, and they take longer to achieve. These are usually more suitable to evaluation.

Long-term outcomes tend to reach to the end or even beyond the end of the program, and often rise to the level of major program objectives or even visions that may involve broader community improvements or social factors.

Text Captions: What to Monitor: Outcomes

Outcomes are impacts or changes anticipated as result of a program

Example:

Short-term outcome: increase client retention in second half of cycle

What to monitor for each client:

Number of sessions scheduled

Number of sessions completed

This monitoring information will be used in evaluation

Remember:

Short-term outcomes: often more tangible, finite, more easily measured

Suitable for monitoring

Mid-term outcomes: more substantial goals, longer horizon

Long-term outcomes: major program objectives

Often more suited for evaluation



Best Practices

Use monitoring best practices to help ensure implementation goes as planned:

- Predetermine benchmarks
- Perform systematic, ongoing tracking and reporting
- Identify gaps, excesses and changes
- Use a participatory approach

Slide 23 - Best Practices

Slide notes: Overall, the purpose of monitoring is to assure that the program is being implemented as planned. This, in turn, increases the likelihood that the program will meet its goals and have the intended outcomes. Some best practices for monitoring include:

- Pre-determine benchmarks;
- Perform systematic, ongoing tracking and reporting;
- Identify gaps, excesses and changes; and
- Take a participatory approach.
- Analyze Reports and Findings in a Timely Manner
- Take a Participatory Approach

Text Captions: Best Practices

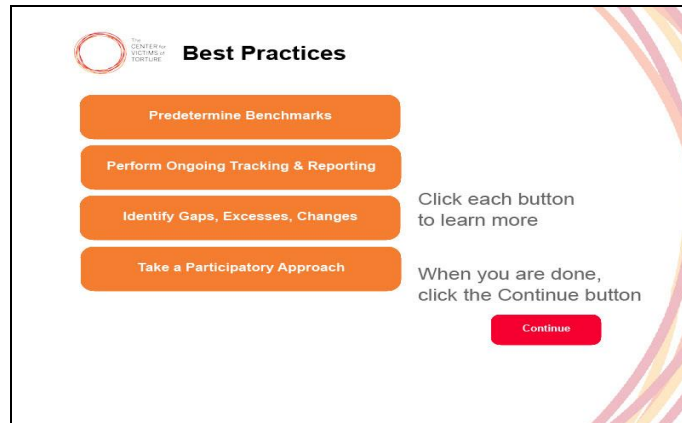
Use monitoring best practices to help ensure implementation goes as planned:

Predetermine benchmarks

Perform systematic, ongoing tracking and reporting

Identify gaps, excesses and changes

Use a participatory approach



Slide 24 - Best Practices

Slide notes: Click each button to learn more about the best practices. When you are finished, click continue.

Text Captions: Best Practices

Predetermine Benchmarks

Perform Ongoing Tracking & Reporting

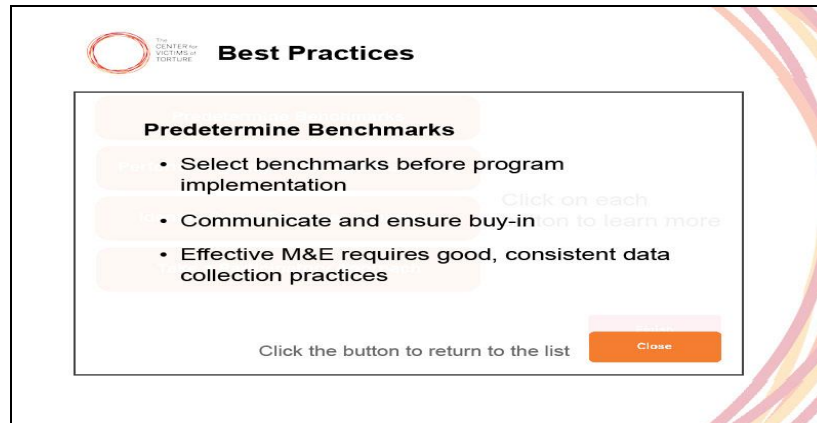
Identify Gaps, Excesses, Changes

Take a Participatory Approach

Click each button to learn more

When you are done, click the Continue button

Continue



Slide 25 - Predetermine Benchmarks

Slide notes: Predetermine benchmarks. It is crucial to plan well and select benchmarks before a program or intervention is implemented. It is also essential to communicate those benchmarks with other staff and ensure buy in.

This step is important to monitoring and evaluation for many reasons, but most pragmatically because data is often collected by other members of the staff.

To effectively measure and analyze information, the data must be collected systematically throughout the program, so all members of the team should be in agreement about what information is being collected and how.

Text Captions: Best Practices

Click on each button to learn more

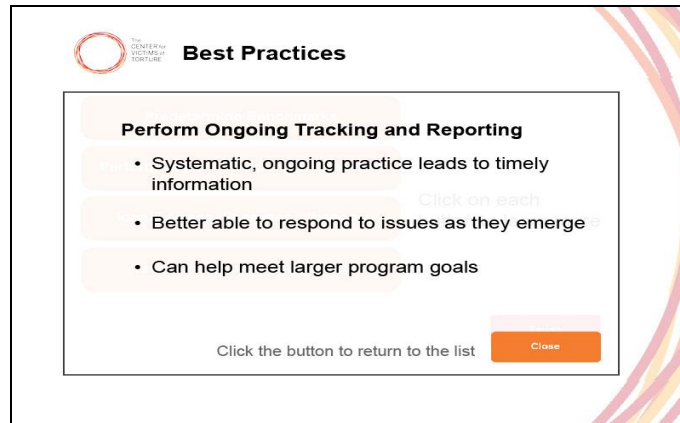
Predetermine Benchmarks

Select benchmarks before program implementation

Communicate and ensure buy-in

Effective M&E requires good, consistent data collection practices

Click the button to return to the list



Slide 26 - Perform Ongoing Tracking and Reporting

Slide notes: Perform systematic ongoing tracking and reporting.

Throughout the life of a program, collect and monitor data regularly and systematically, and report on that data often.

When tracking is systematic and ongoing, you can have precise, timely information to report.

And, when you are able report information in a timely way, the project team has the opportunity to address issues and concerns as they emerge—to make program changes or reassess benchmarks as appropriate. This makes monitoring more useful in helping to meet program goals.

Text Captions: Click on each button to learn more

Best Practices

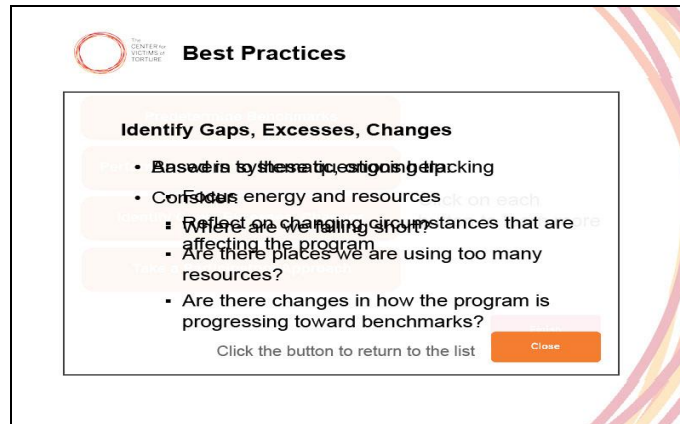
Can help meet larger program goals

Better able to respond to issues as they emerge

Systematic, ongoing practice leads to timely information

Perform Ongoing Tracking and Reporting

Click the button to return to the list



Slide 27 - Identify Gaps, Excesses, Changes

Slide notes: Identify gaps, excesses and changes. As we said, timely access to highquality data can help you identify and address potential issues.

Use your monitoring information to identify where the program is falling short of benchmarks, where perhaps you are doing too much activity or have excesses, and what changes are you seeing over time.

This can help the program team to:

- Understand where they should put additional energy or resources to fill gaps;
- See where they can “pull back” or conserve resources; and
- Reflect on and address change in progress or circumstances that are affecting the work.

Text Captions: Best Practices

Click on each button to learn more

Identify Gaps, Excesses, Changes

Based in systematic, ongoing tracking

Consider:

Where are we falling short?

Are there places we are using too many resources?

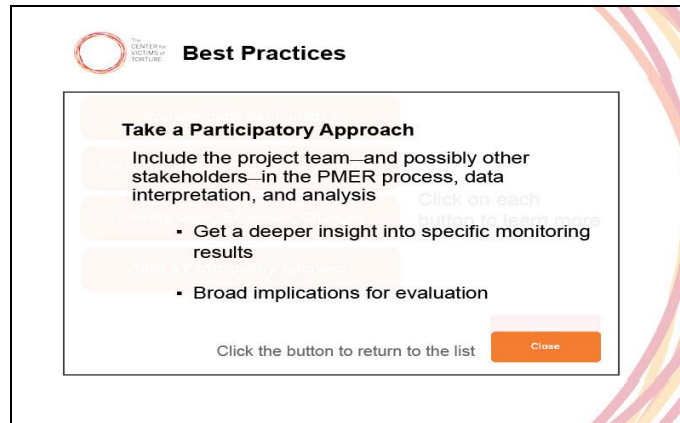
Are there changes in how the program is progressing toward benchmarks?

Answers to these questions help:

Focus energy and resources

Reflect on changing circumstances that are affecting the program

Click the button to return to the list



Slide 28 - Take a Participatory Approach

Slide notes: Take a participatory approach. This typically involves including the project team in the interpretation of the data, but it can also include other stakeholders.

These other stakeholders might be people such as community members and clients, and they can be included in all phases of PMER, from planning to writing up final reports.

With a participatory approach, you get a broader perspective on the monitoring results.

For example, specific members of the team who are engaged in the program's work or individuals in a community may have insight into less apparent or less tangible factors that may be affecting the work.

The participatory approach also has broader implications for evaluation, as we discuss in the Evaluation lesson in this PMER Basics Unit.

Text Captions: Best Practices

Click on each button to learn more

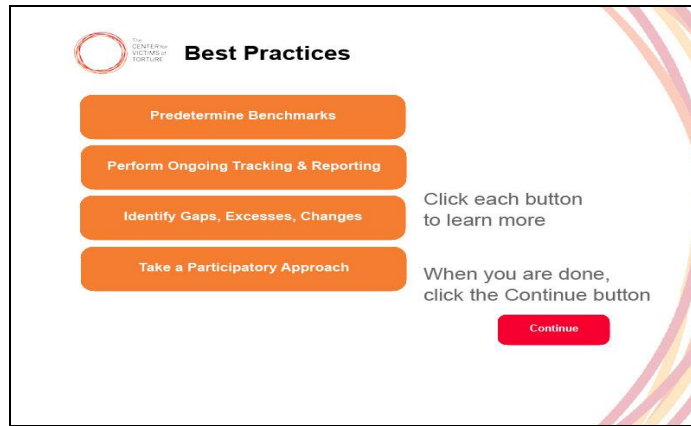
Take a Participatory Approach

Include the project team—and possibly other stakeholders—in the PMER process, data interpretation, and analysis

Get a deeper insight into specific monitoring results

Broad implications for evaluation

Click the button to return to the list



Slide 29 - Best Practices

Slide notes: Click each button to learn more about the best practices. When you are finished, click continue.

Text Captions: Best Practices

Predetermine Benchmarks

Perform Ongoing Tracking & Reporting

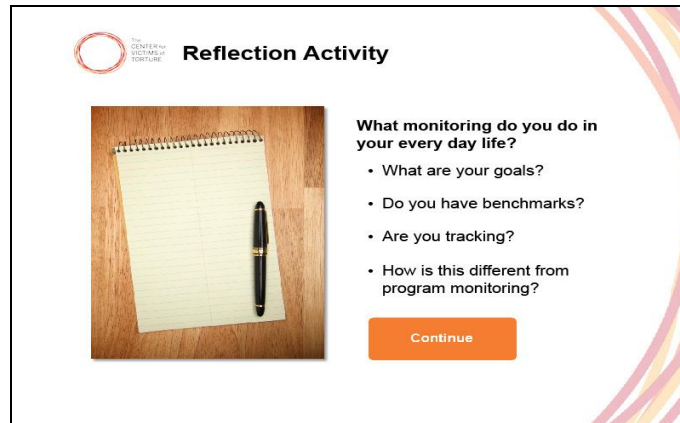
Identify Gaps, Excesses, Changes

Take a Participatory Approach

Click each button to learn more

When you are done, click the Continue button

Continue

The slide is titled "Reflection Activity" and features a logo for "The CENTER for VICTIMLESS TORTURE" in the top left. It includes a photograph of a spiral notebook and a pen on a wooden surface. The main text asks, "What monitoring do you do in your every day life?" and lists four bullet points: "What are your goals?", "Do you have benchmarks?", "Are you tracking?", and "How is this different from program monitoring?". An orange "Continue" button is located at the bottom right of the content area.

Reflection Activity

What monitoring do you do in your every day life?

- What are your goals?
- Do you have benchmarks?
- Are you tracking?
- How is this different from program monitoring?

Continue

Slide 30 - Reflection Activity

Slide notes: Think for a moment about your own everyday life. Can you think of an activity that you monitor, formally or informally? What are your goals? Do you have certain benchmarks? Are you tracking your progress in any way?

And, how is this different from program monitoring?

Take a moment now to reflect and write some of your thoughts. When you are finished, click continue.

Text Captions: Reflection Activity

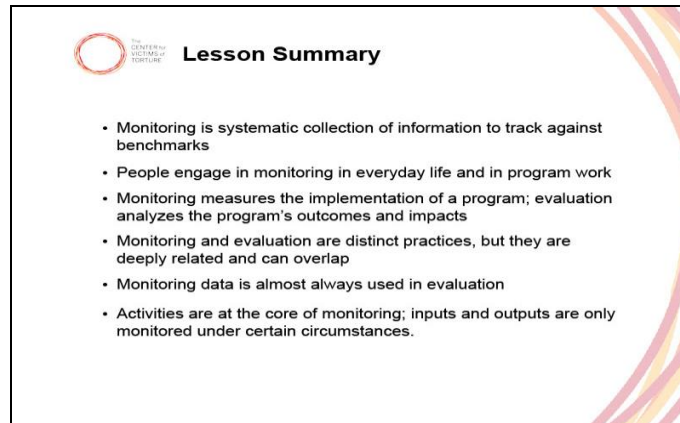
What monitoring do you do in your every day life?

What are your goals?

Do you have benchmarks?

Are you tracking?

How is this different from program monitoring?



The slide features the logo of The Center for Victims of Torture in the top left corner. The title "Lesson Summary" is centered at the top. A list of six bullet points is presented in the center, detailing the concepts of monitoring and evaluation. The slide has a decorative background of curved lines in shades of pink, orange, and yellow on the right side.

Lesson Summary

- Monitoring is systematic collection of information to track against benchmarks
- People engage in monitoring in everyday life and in program work
- Monitoring measures the implementation of a program; evaluation analyzes the program's outcomes and impacts
- Monitoring and evaluation are distinct practices, but they are deeply related and can overlap
- Monitoring data is almost always used in evaluation
- Activities are at the core of monitoring; inputs and outputs are only monitored under certain circumstances.

Slide 31 - Lesson Summary

Slide notes: In summary:

- Monitoring is the systematic collection of information to track progress against benchmarks.
- We engage in monitoring behaviors—formally and informally—in our everyday lives as well as in our work.
- Monitoring measures the implementation of a program or intervention. Evaluation analyzes outcomes and impacts of a program or intervention.
- Monitoring and evaluation are distinct practices with different objectives; however, the two activities are deeply related, there are areas of overlap, and monitoring data is almost always used in evaluation.
- Activities—the active mechanisms by which a program works—are often the majority of what is measured in monitoring. Inputs and outputs are not usually the focus of monitoring but may be monitored under certain circumstances.

Text Captions: Lesson Summary

Monitoring is systematic collection of information to track against benchmarks

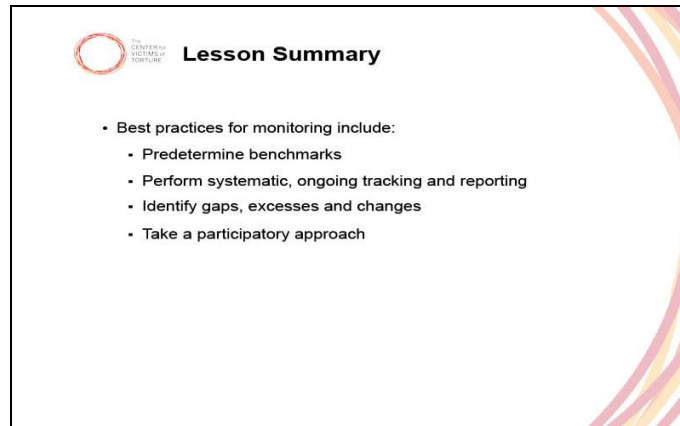
People engage in monitoring in everyday life and in program work

Monitoring measures the implementation of a program; evaluation analyzes the program's outcomes and impacts

Monitoring and evaluation are distinct practices, but they are deeply related and can overlap

Monitoring data is almost always used in evaluation

Activities are at the core of monitoring; inputs and outputs are only monitored under certain circumstances.



Slide 32 - Lesson Summary

Slide notes: Some best practices for Monitoring include:

- Predetermine benchmarks
- Perform systematic, ongoing tracking
- Identify gaps, excesses and changes, and
- Take a participatory approach.

Text Captions: Lesson Summary

Best practices for monitoring include:

Predetermine benchmarks

Perform systematic, ongoing tracking and reporting

Identify gaps, excesses and changes

Take a participatory approach