Module 1: Introduction to the Designing and Implementing M&E Systems

Course

Session 1: Introduction to Designing and Implementing Monitoring and Evaluation Systems Course

The content of these videos are aimed to provide some of the foundations for understanding key

concepts and principles in in establishing a monitoring and evaluation systems, including the

approach of results based management. It is intended that the information contained within this

series will be complemented in the future by in-class training by selected resource people.

The original content of this training is drawn from AKF’s Facilitator’s Guide on Designing and

Implementing Monitoring and Evaluation Systems.

Specifically, the objectives of this training are to:

• Develop an understanding of the guiding principles of sound monitoring and evaluation systems

• Develop a basic understanding of how to use Results Based Management to develop robust

monitoring and evaluation systems

• Develop an understanding of how to strengthen monitoring and evaluation systems in our units

By the end of this online course it is expected that you will be able to :

• Understand the difference between monitoring and evaluation

• Understand the ten steps in establishing a monitoring and evaluation system

• Understand how to develop a monitoring and evaluation plan

The course is organized into six modules.

• Module 1: Introduction to Monitoring and Evaluation, Designing and Implementing Monitoring &

Evaluation Systems

• Module 2: Defining Results and Results Based Management

• Module 3: How to Know Change has Happened - Developing and Selecting Indicators

• Module 4: How to Collect Information including Data Sources, Methodologies, Frequency and

Responsibilities

• Module 5: Articulating and Monitoring Assumptions and Risks, Grouping Indicators and

Developing Output Monitoring Tools

Finally, Module 6 will provide an overview of the course.

Each module and associated sessions follows a similar format and is organized in the following way:

• The session content

• Additional resources on selected topics to explore further on your own

• A quiz at the end of the module to see if you’ve understood the content

• Instructions for a self-directed exercise to apply your new learning; and

As with any training course there are limitations to the amount of material that can be covered.

The content of this training does not go into detail beyond Step 6 of designing a monitoring and

evaluation System.

It also does not cover topics related to data collection through non-routine methods such as surveys,

focus groups discussions or individual interviews. Nor, does it focus on baselines and establishing

targets.

Wherever possible, additional resources are provided to explore these topics independently.

Now, let’s get started. Click on Session 2 in this module to begin your journey into designing and

implementing monitoring and evaluation systems.

Session 2: Monitoring and Evaluation Concepts

Welcome to the first module of designing and implementing monitoring and evaluation systems. In

this session, we'll explore the basic concepts of monitoring and evaluation, and the difference and

the relationship between the two.

At the end of this session, it is expected that you will be able to define the concepts of monitoring

and evaluation. You will also be able to identify what makes each concept distinct from the other.

Monitoring is defined as the systematic collection of data for selected indicators to demonstrate the

extent of progress, the achievement of results and the use of allocated funds.

Monitoring is an on-going and systematic process which takes place throughout the project cycle.

It emphasises learning by doing and using information and evidence to inform decisions.

Monitoring is also a way to demonstrate progress against expected results. This means going beyond

simply the tracking of activities and resources. But collecting data and information to track progress

and changes.

In monitoring, we ask the question “are we making progress?”

Monitoring processes need to be coordinated between all sectors in a programme. This includes

collaboration between sectors working in health, education, rural development and civil society, in

the collection of information so that it is relevant to the organisation as a whole.

It is also important to remember that monitoring involves all staff in the programme including

monitoring and evaluation staff and programme staff and is not done by one person or group alone.

It involves everyone.

Overall, Monitoring is integrated into everything we do.

Evaluation on the other hand, is defined as the systematic and objective assessment of an on-going

or completed project, programme or policy, its design, implementation and results. Its aim is to

determine the relevancy, efficiency, effectiveness, sustainability and impact.

Evaluations can take place at various points during the programme lifespan.

Evaluations contribute to organizational learning and continuous improvement of approaches and

strategies. They are essential to informing learning and making adjustments to future projects and

programmes

Evaluations go beyond simply stating the progress on results, but also the way in which the program

was delivered and effectiveness in how resources were utilised

Evaluation asks the questions have we done the right thing, how can it be done better and what

overall change has occurred?

As you may have noticed, there are several differences between monitoring and evaluation. These

differences are mainly in their frequency, main actions, overall purpose, focus, types of questions it

aims to answer and who is typically responsible for each.

Let’s go through each of the areas and see the differences.

Monitoring is continuous and regular throughout the project or programme cycle. Evaluations on the

other hand are typically periodic and happen at specific intervals such as at the mid-term or end of

the project or programme.

The main action in monitoring is the collection of routine data, analysing this data and using the

information to inform decisions. In evaluation the analysis is more in-depth

The overall purpose of monitoring is to demonstrate results and learning. It also informs decision

making during implementation. On the other hand, evaluation assesses what has been achieved

overall and how it has been achieved.

In terms of focus, monitoring looks at the inputs, activities, outputs, outcomes, risks and

environment. Evaluation focuses on overall effectiveness (including results), efficiency, reach, impact

and sustainability.

Monitoring answers the questions, ‘are we making progress? What has been achieved? And, What

are we learning? Evaluation on the other hand asks, “Have we done the right things? How can it be

done better? And, “What has been the overall change?”

Finally, there are differences in who is generally responsible for monitoring and evaluation.

Monitoring is undertaken by project managers, monitoring and evaluation staff, field staff, partners

and even the community. Evaluation on the other hand is generally not conducted by those

implementing the program, but rather by external evaluators or donors.

Now that we have briefly reviewed what monitoring and evaluation is and the differences between

the two, let’s explore monitoring a bit further by asking the question, “What do we monitor?”

We monitor many things throughout the project and programme cycle. These include:

• The completion of activities - Have we done what we said we would do?

• Time - How long it has taken to complete activities versus what was planned

• Resources – What resources are we using?

• Assumptions - What assumptions are in place and is the logic of our strategies correct?

• Risks - What are the risks in achieving our results; and

• Results Achieved - What changes and results have been achieved, including changes in gender

equality?"

Why do we monitor? We monitor for three main reasons – accountability, learning and decision

making. Let’s explore each one individually.

The first reason for monitoring is for accountability. There is upward accountability and downward

accountability.

Upward accountability is to donors or the board of directors. Downward accountability is to targeted

communities, other organizations and our partners.

This means that the data gathered through monitoring is disseminated upwards to donors or the

board and downwards to communities, organizations and partners.

The second reason to monitor is for learning. Monitoring for learning helps us to identify the

changes, if any and identify strengths and weaknesses of our interventions and to be able to learn

from them in order to make adjustments and improve our programmes based on information that is

collected. In other words decision making – the third reason to monitor regularly.

Monitoring therefore is done both for external audiences and internal learning and decision making.

What is important to remember is that everyone within the organization is part of this process and it

must be integrated into the organizational culture.

Congraultations. You have completed Session 2 on the concepts and definitions of monitoring and

evaluation. In our next session, we will look at the ten steps in establishing a monitoring and

evaluation system.

For further information and additional resources on monitoring and evaluation concepts, click on on

the resources section for this session.

Session 3: Establishing a Monitoring and Evaluation System (Part 1)

Welcome to Session 3 – Establishing a Monitoring and Evaluation System. In this session we will

review the first six steps involved in establishing a robust monitoring and evaluation system.

At the end of this session it is expected that you will be familiar with some of the steps involved in

establishing a monitoring and evaluation system. It is also expected that you will become more

comfortable with establishing or strengthening existing systems in your own programme and unit

A monitoring and evaluation system is defined as a system for collecting and utilizing information on

the progress of a project or programme.

We collect and utilize this information with the overall goal of improving the project or programme.

The purpose of establishing a monitoring and evaluation system is to have a structured framework in

order to systematically plan what data is collected. When it is collected. How often it is collected.

How we will collect it. How we will analyze the data, and finally how we will use it to inform decision

making.

It is important to keep in mind also that this system serves as a communication system in order to

disseminate information both upwards and downwards to various stakeholders.

That it focuses on the programme level and not just individual projects.

That it is not simply a management information system, but the overall plan and the steps taken to

implement this plan.

Overall a monitoring and evaluation system is not a standalone framework, but one which is

integrated into the organizational structure and processes.

There are generally ten steps in establishing a robust monitoring and evaluation system.

During the course of the next few slides, we will review each of these steps briefly.

Our next module will go into more detail about some of these steps so don’t worry if you have

missed something.

Before beginning however it is important to note that a successful M&E system is only possible when

there is:

• Commitment and priority from management to monitoring and evaluation

• The available financial resources for data collection, analysis and reporting

• The available human resources such as time and technical capacity of monitoring and evaluation

staff

• There is a shared understanding of the importance of a systematic process in informing decisions

and learning; and

• A clear and updated programme strategy which the monitoring and evaluation system can be built

on

Now, let’s review each of the steps briefly.

In Step One we ask the question, “what does change look like?”

This involves determining the change (or the result) we expect to see as a result of our activities,

strategies and interventions. It is important to remember that changes are never gender neutral and

so we also look at gender equality implications. Also do not forget to think through environmental

implications where relevant.

It also involves determining the strategic priorities for the programme such as national sectoral

development plans, country unit strategies and others.

Practically speaking, this step involves the development of a results framework

In step two we ask, “how do we know that change has actually happened?”

It is in this step that we select or develop indicators to measure outcomes and those to monitor

outputs, activities, inputs and risks.

Step three involves the collection of data to inform our indicators.

It is in here that we determine how data will be collected, from where this data will come. Deciding

who will collect, analyse and report on the data. And when the data for each indicator will be

collected.

Step four is articulating risks and assumptions. Here we identify the assumptions of the programme,

identify the potential internal and external risks that would prevent the programme from achieving

its expected results, including the risks associated with achieving gender equality results. Practically

speaking, in this step we develop our risk management and monitoring matrix.

The next step involves grouping our indicators to determine which ones can be collected at the same

time by the same person and ideally using the same tools.

In this step we also map the indicators we will collect in periodic studies.

Step six is when we design data collection tools, primarily for output monitoring. Pre-test these tools

and collect our routine monitoring data.

Here we also design any study tools, where relevant, and test them as well.

Up until this point, we have reviewed briefly steps one to six in establishing a monitoring and

evaluation system. In the next session we will continue with step 7 to 10 of establishing a

monitoring and evaluation system.

Session 4: Establishing a Monitoring and Evaluation System (Part II)

Welcome to Session 4 – The second part in establishing a Monitoring and Evaluation System. In the

previous video we reviewed steps 1 to 6 of the M&E system. In this session we will continue with our

review of steps 7 to 10.

Step seven of the M&E system involves data collection and management.

In this step, we:

• Collect routine data for our outputs, activities and even some of our outcomes.

• Collect or identify our baseline data

• Determine targets based on baseline data collected

• Collect periodic data through studies. These studies can partly be outsourced depending on what

level data is being collected or the internal capacity and resources available in the organization

• Ensure Data Quality. Specifically the Reliability, Validity, and Timeliness of data collection; and

• During this phase, we also ensure that data is cleaned, entered and managed appropriately with

databases and archiving systems.

The last three steps in the system establishment - Step 8, 9 and 10 are generally when assessment,

evaluation and learning take place.

Step 8 for instance, is the step in which we analyze our data and examine the trends and meaning

behind the data that has been collected in previous steps.

This analysis can be done internally or externally depending on the complexity of data

In step 9, we interpret this data, compile the data and present the analysed data in a clear and

coherent way. This is done through the presentation of data on graphs or in tables depending on

which audiences we are trying to reach.

In the interpretation of data, the timeframes used are important and reporting on data in a timely

way is critical. The timeframes uses must also be communicated when reporting findings.

It is in the final step that we use the data to inform learning.

Specifically we:

• Use findings for learning and to improve performance

• Communicate the findings to external audiences

• Make adjustments and adopt lessons for future programming

• These are done to ensure accountability to all stakeholders

In summary, establishing and implementing an M&E system involves ten steps as we have seen in

Part 1 and Part 2 of these videos.

Each of these steps takes time and requires the commitment and priority from the unit.

In order to ensure the success of a useful monitoring and evaluation system, there are several

factors that are needed:

• Readiness – do we have the necessary human and financial resources available

• Ownership – do the critical people see the need for the system? Do they have a say in building the

system?

• Management and maintenance – do we have the competent skills and financial resources to

manage and maintain the system?

• Utilization of information – is the right amount of data being collected? Is there too much data that

is not being used to inform results and learning?

• Quality of information – is the data reliable and does it measure the intended results. And Finally

• Sustainability – if there is a change in leadership or staff in monitoring units? Will the system

continue to function without them?

Congraultations. You have completed Session 4 on on the ten steps for establishing an M&E system.

You have also successfully completed Module 1 of this course.

For further information and additional resources on establishing monitoring and evaluation systems,

click on on the resources section for this session.

Also, click on the quiz for this session to test your knowledge on the concepts we have reviewed in

this module.

Module 2: Introduction to the Designing and Implementing M&E Systems

Course

Session 1: Step One: Defining Results and Results Based Management and Results Frameworks

(Part 1)

Welcome to Part one of Module 2 – Results Based Management and Results Frameworks. In this

session we will review the first step in establishing a monitoring and evaluation system - What Does

Change Look Like and Defining Results

At the end of this session it is expected that you will:

• Have a greater understanding about results based management (or RBM)

• Understand the cause and effect relationship between results

Before we begin, It is important to remember that while results based management (or RBM) is a

common management approach, different users may use different terminologies.

In this course we will be using the terms:

• Results Framework to refer to the visual depictions of the relationship between activities, outputs

and outcomes. Others may refer to this as a Logic Model.

• M&E Plan to refer to an eight column matrix which outlines the results, performance indicators,

baseline, targets, sources of information, methods for collection, frequency and responsibility.

Others may refer to this as a Performance Measurement Framework

Let’s start by reviewing the definition of a result. A result is a change which can be described and

measured. It is influenced directly or indirectly by our programme interventions and/or other

external factors

There are various levels of results:

- Goal

- Higher Level Outcomes

- Lower Level Outcomes

- Outputs

Remember other donors and stakeholders may use different terminologies like intermediate

outcome or medium term outcome to mean the same thing as higher level outcomes. What is

important to remember is that regardless of the terminology, there is still a cause and effect

relationship that occurs.

These are linked together by a results chain. The results chain is a cause and effect relationship

between activities, outputs and outcomes.

Let’s look at the results chain in more detail and how they link together.

- Prior to the results coming together, financial, human and material inputs are required. These

inputs feed directly into activities. Inputs are not part of the results framework, but are shown here

to demonstrate how they contribute to activities.

- Activities are the actions taken to produce outputs. Activities are ‘what’ interventions will take

place. It is important to remember these are not results.

- Outputs are the direct products or services stemming from a bundle or group of activities. In some

cases however, depending on the donor, outputs are simply a completed activity and do not

represent any change. It is also important to remember that outputs are tangible and therefore they

can be budgeted for.

- Outcomes, both Higher and Lower Level, are changes that occur once outputs are achieved. They

are often described as sustainable changes in behaviour, practices or state of individuals, entities, or

systems. These results can either be short term or medium term.

- Finally, the goal is defined as a change that occurs as a consequence of achieved outcomes. It is

often described as a sustainable change of state, individuals, entities, systems and happens in the

long term.

Let’s take a look at an example of a results chain from a water and sanitation project.

In this results chain (or result stream) we can see that the outputs lead directly to the outcome of

increased availability and use of safe water. This in turn, leads to the expected change of reduced

incidence of water borne diseases. And, which can contribute to improving the health status.

It is important to remember that logic is not always linear – from one set of outputs to one outcome.

In fact, more than one outcome can contribute to another outcome at a higher level. In this example

we can see that two lower outcomes can potentially contribute to one higher outcome. However, in

developing a results framework, we generally consider each results stream individually. The

combination of these results streams together contribute to achieving the goal.

While this may be one disadvantage of RBM, using the results framework is still a useful way to

visually depict logic.

Any project or programme you design must be logical in terms of the results you aim to achieve

A useful way to ensure that the progression from activities to goal are logical is to test it by using “If

and Then” for each results stream. This allows you to see if the basic assumptions of your results

chain holds true.

For example, if the outputs are accomplished, THEN, the lower level outcomes should be achieved.

And, IF, the lower level outcomes are achieved, THEN, it is expected that the higher level outcomes

will be achieved and so forth.

In the results chain, the programme’s ability to control or influence the high level outcomes is lower

than its ability to influence lower level outcomes.

Generally speaking, the higher up the results chain you go, the less influence you have and the more

time it takes for the expected result to be achieved.

This brings us to the end of Session 1 on Results Based Management. In the next session we will

explore how to define our results and develop clear result statements.

Session 2: Step One: Defining Results and Results Based Management and Results Frameworks

(Part 2)

Welcome back. In the last session we looked at the cause and effect of results and how these fit

together. We are going to continue with defining and developing result statements.

When developing result statements, these must be SMART. This means:

S – the results statement must be specific in terms of what is expected to change. Who will it

benefit? Where will the expected change take place?

M – the result must be measurable. This means that information on the expected change can be

collected to demonstrate the change.

A – the results must be achievable. Is it within the scope of the programme? Will it be achieved

within the time frame and with the available resources?

R – the results must be relevant. It must reflect the needs and priorities among the target

community. Is it possible to contribute to the change occurring?

T – the result is time bound. This means considering the time frame as well as being able to track the

change over time.

Result statements are generally written using a ‘directional verb’ in the past tense. These directions

can either be positive or negative. For example something has ‘increased’ or been ‘enhanced’ versus

something that has ‘decreased’ or ‘reduced’.

Examples of these include:

• Increased Food Security of Targeted households in Country X

• Strengthened Institutional and Managerial Capacity of Organization X

• Reduced Child Mortality in Region X

It is important to remember that each statement should include the following:

- WHAT change do you want to see? For example, Enhanced Economic Empowerment

- For WHOM is the change intended? For example, enhanced economic empowerment for targeted

households, especially female headed households

- WHERE is this change expected to happen? For example, enhanced economic empowerment for

the targeted households in a specific region.

“When” is not typically included in a result statement, particularly for higher level outcomes. In

some cases, lower level results or even outputs can include a time period, particularly in cases where

an intervention is a pilot or temporary.

Finally, when writing result statements we must be clear of the change we want to see. Terms such

as ‘support’, ‘enabling environment’, ‘strengthening’, ‘and economic empowerment’ etc. should be

clearly defined. This is referred to as operationalizing the result – defining specifically what is meant

by the change.

Using our same example of Enhanced economic empowerment of targeted households, especially

women in Region X, operationalizing this might mean:

• Household wealth status such as income, savings, level of debt, and asset ownership

• Decision making in the household

• Food security\* and coping strategies. As you can see even Food security will need further defining.

In Summary:

A Results Framework is a visual depiction of your strategy and the logic of the changes you expect to

see Results are linked together in a results chain.

There are various terminologies used for results language by various donors. The key is to ensure

consistency of terminology and definition

Results rarely occur in a simple linear fashion with one following the other in a simple “if-then”

pattern. Instead results are often interconnected and sometimes sidestep the linearity of the results

chain.

Results should be as S.M.A.R.T as possible so that there is no confusion in what change is expected.

Where there is any ambiguity, ensure that the result statement is defined in a footnote or

corresponding document.

The programme’s ability to control or influence the high level outcomes is lower than its ability to

influence lower level outcomes.

Congraultations. You have completed Module 2 on Results Based Management and Results

Frameworks.

For further information and additional resources on results based management, click on on the

resources section for this session.

For this module, a self-directed exercise is also available in the [exercises] section for this section.

We encourage you to take some time to go through this exercise to apply some of your new

knowledge.

Module 3: M&E Plans – Step 2: Developing and Selecting Performance

Indicators

Session 1: Step Two: Developing and Selecting Performance Indicators (Part I)

The aim of this session is to learn how to develop or select appropriate indicators in order to

measure and assess the programme’s expected results.

This session will also provide an opportunity to reflect on how we are demonstrating results through

the use of appropriate quantitative and qualitative indicators.

At the end of this unit, you will be able to develop performance indicators for your results as well as

determine which indicators can be selected for measuring your results.

Developing and selecting Performance Indicators is the second step of establishing and

implementing an integrated M&E System as described in the previous module. These are also

included in your overall monitoring and evaluation plan.

This plan as we have discussed has eight columns and contains all the relevant information to

monitor and measure change in your project or programme.

It is important to note, before we begin, that developing or selecting performance indicators

is not done in isolation. Rather, it is an iterative process which should be revisited, at least on an

annual basis, based on the programme’s experience.

It also involves some thinking ahead to what methodologies might be appropriate for collecting the

information.

An indicator is a signal that shows whether or not progress is being made. Indicators are used as a

means to measure results at each level.

An indicator should usually be:

• unbiased and neutral (there is no direction like the result statement)

• Ideally, not include any targets

In some cases however, indicators do include targets and some donors accept a direction. For the

purposes here however we will not be using targets within the indicator statement. We also suggest

that indicators remain neutral and the change is captured in the result statement itself.

When developing or selecting an indicator, we ask the questions:

“What does the result mean?”

“How do I know that the change has happened?”

Indicators are selected for each result statement in the results framework.

For each results, we need to ask, “which indicator would be best to measure and demonstrate the

result has happened?”

So, how many indicators should we select for each result?

The answer is the number which is required to adequately demonstrate the result.

As we go up the results chain, typically we add more indicators

At output level, one indicator can be sufficient

Overall, it is a balance between what we “need” to know and what we “want” to know. Having too

many indicators however, will increase the monitoring burden.

There are two types of indicators – those at the outcome level and those at the output level.

Outcome indicators measures the change (or the result statement)

They often use the unit of percentage, average or median and not number.

Indicators at the higher level outcome are also for the targeted population, not the broader

population

Output indicators on the other hand are those that you can plan for in your budget

They do not measure any change. Instead, they demonstrate that a process has been completed

Indicators at this level often use the unit of number as we are simply demonstrating that a process

has been completed.

For example,

At the outcome level we may want to measure a change in food security. We may select the

indicator: percentage of households that are food secure.

At the output level we may want to see how many people are trained in a particular topic. We would

then select an indicator such as: number of men and women trained in establishing a home garden

Indicators can be either quantitative or qualitative.

Quantitative indicators measure quantity and are numerical. Examples of these could include:

• Number of

• Frequency of

• Percentage of

• Ratio of

• Median, Mean (or average), Mode

Qualitative indicators on the other hand measure perceptions, attitudes or judgments. Examples of

these include:

• Perception of

• Existence of

• Type of

• Quality of

• Extent to which

• Level of

• Degree to which

We have come to the end of part one of developing and selecting performance indicators. In our

next session we will continue with this topic and explore further how to develop or select a good

indicator and criteria for selecting indicators.

Session 2: Step Two: Developing and Selecting Performance Indicators (Part II)

Welcome to part two of developing and selecting performance indicators.

In the previous session we talked about what is an indicator and types of indicators.

In this session we will continue to learn about what makes a good indicator, disaggregation of

indicators and criteria for selection of indicators.

Let’s begin.

A good indicator generally contains five components.

First, determine what you are measuring. In our example, we want to measure school enrolment

Second, add a unit. For example, number of students enrolled

Third, add quality, specifics and the universe. For example, # of students enrolled in primary school

Fourth, add a time frame such as # of students enrolled in primary school each semester. The time

frame is dependent on the sector so at times it is optional to include.

Finally, add your disaggregation. In our example we add disaggregation by sex and district

This process would apply also for qualitative indicators. The key is to be specific and to include all

relevant information

When developing or selecting indicators there are other things to keep in mind.

As we mentioned, indicators should be disaggregated. This means that the indicator can capture

different sensitivities such as sex, age group, economic class, geography and others which may be

appropriate to your programme.

Examples of disaggregation can include:

• Disaggregation by sex and age group for an indicator capturing how many youth were trained on

HIV/AIDS prevention

• Disaggregation by household type and geographic area for an indicator measuring households

with sufficient food

Where indicators are used to count people, they must always be sex-disaggregated to demonstrate

that both men/boys and women/girls are benefitting equally

Finally, when we select or develop indicators, there are also key criteria we need to follow:

• Validity. Is the indicator valid? Does the indicator measure the result?

• Reliable. Is the indicator a consistent measure over time? Can we use the indicator to measure

trends over time? And is the indicator sensitive to change over time?

• Simplicity. Will the data be easy to collect?

• Utility. Will the indicator be able to generate useful information for decision-making and learning?

• Affordability. Can the programme afford to collect the data with the resources it has? Is the data

collected worth the effort and expense?

In summary,

1. Indicators are ‘signals’ to measure expected results at each level of the results chain

2. Indicators should be stated neutrally

3. Indicators at higher and lower outcome levels measure developmental change, whereas

4. indicators at output level demonstrate a completed process

5. Indicators at the higher level outcome are for the targeted population, not the broader population

6. Indicators at the outcome levels should use the unit of percentage and not number

7. Indicators should be disaggregated, where relevant

8. Where indicators are used to count people, they should always be sex-disaggregated

9. Don’t add too many indicators unnecessarily. Follow the criteria when choosing or developing

your indicators

Congratulations. You have completed Module 2 on developing and selecting performance indicators.

Click on the quiz for this session to test your knowledge on the concepts we have reviewed.

For further information and additional resources on indicators, click on on the resources section for

this session.

In our next module, we will explore Step 3 of an M&E System - HOW TO COLLECT DATA.

Module 3: M&E Plans – Step 2: Developing and Selecting Performance

Indicators

Session 1: Step Two: Developing and Selecting Performance Indicators (Part I)

The aim of this session is to learn how to develop or select appropriate indicators in order to

measure and assess the programme’s expected results.

This session will also provide an opportunity to reflect on how we are demonstrating results through

the use of appropriate quantitative and qualitative indicators.

At the end of this unit, you will be able to develop performance indicators for your results as well as

determine which indicators can be selected for measuring your results.

Developing and selecting Performance Indicators is the second step of establishing and

implementing an integrated M&E System as described in the previous module. These are also

included in your overall monitoring and evaluation plan.

This plan as we have discussed has eight columns and contains all the relevant information to

monitor and measure change in your project or programme.

It is important to note, before we begin, that developing or selecting performance indicators

is not done in isolation. Rather, it is an iterative process which should be revisited, at least on an

annual basis, based on the programme’s experience.

It also involves some thinking ahead to what methodologies might be appropriate for collecting the

information.

An indicator is a signal that shows whether or not progress is being made. Indicators are used as a

means to measure results at each level.

An indicator should usually be:

• unbiased and neutral (there is no direction like the result statement)

• Ideally, not include any targets

In some cases however, indicators do include targets and some donors accept a direction. For the

purposes here however we will not be using targets within the indicator statement. We also suggest

that indicators remain neutral and the change is captured in the result statement itself.

When developing or selecting an indicator, we ask the questions:

“What does the result mean?”

“How do I know that the change has happened?”

Indicators are selected for each result statement in the results framework.

For each results, we need to ask, “which indicator would be best to measure and demonstrate the

result has happened?”

So, how many indicators should we select for each result?

The answer is the number which is required to adequately demonstrate the result.

As we go up the results chain, typically we add more indicators

At output level, one indicator can be sufficient

Overall, it is a balance between what we “need” to know and what we “want” to know. Having too

many indicators however, will increase the monitoring burden.

There are two types of indicators – those at the outcome level and those at the output level.

Outcome indicators measures the change (or the result statement)

They often use the unit of percentage, average or median and not number.

Indicators at the higher level outcome are also for the targeted population, not the broader

population

Output indicators on the other hand are those that you can plan for in your budget

They do not measure any change. Instead, they demonstrate that a process has been completed

Indicators at this level often use the unit of number as we are simply demonstrating that a process

has been completed.

For example,

At the outcome level we may want to measure a change in food security. We may select the

indicator: percentage of households that are food secure.

At the output level we may want to see how many people are trained in a particular topic. We would

then select an indicator such as: number of men and women trained in establishing a home garden

Indicators can be either quantitative or qualitative.

Quantitative indicators measure quantity and are numerical. Examples of these could include:

• Number of

• Frequency of

• Percentage of

• Ratio of

• Median, Mean (or average), Mode

Qualitative indicators on the other hand measure perceptions, attitudes or judgments. Examples of

these include:

• Perception of

• Existence of

• Type of

• Quality of

• Extent to which

• Level of

• Degree to which

We have come to the end of part one of developing and selecting performance indicators. In our

next session we will continue with this topic and explore further how to develop or select a good

indicator and criteria for selecting indicators.

Session 2: Step Two: Developing and Selecting Performance Indicators (Part II)

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In the previous session we talked about what is an indicator and types of indicators.

In this session we will continue to learn about what makes a good indicator, disaggregation of

indicators and criteria for selection of indicators.

Let’s begin.

A good indicator generally contains five components.

First, determine what you are measuring. In our example, we want to measure school enrolment

Second, add a unit. For example, number of students enrolled

Third, add quality, specifics and the universe. For example, # of students enrolled in primary school

Fourth, add a time frame such as # of students enrolled in primary school each semester. The time

frame is dependent on the sector so at times it is optional to include.

Finally, add your disaggregation. In our example we add disaggregation by sex and district

This process would apply also for qualitative indicators. The key is to be specific and to include all

relevant information

When developing or selecting indicators there are other things to keep in mind.

As we mentioned, indicators should be disaggregated. This means that the indicator can capture

different sensitivities such as sex, age group, economic class, geography and others which may be

appropriate to your programme.

Examples of disaggregation can include:

• Disaggregation by sex and age group for an indicator capturing how many youth were trained on

HIV/AIDS prevention

• Disaggregation by household type and geographic area for an indicator measuring households

with sufficient food

Where indicators are used to count people, they must always be sex-disaggregated to demonstrate

that both men/boys and women/girls are benefitting equally

Finally, when we select or develop indicators, there are also key criteria we need to follow:

• Validity. Is the indicator valid? Does the indicator measure the result?

• Reliable. Is the indicator a consistent measure over time? Can we use the indicator to measure

trends over time? And is the indicator sensitive to change over time?

• Simplicity. Will the data be easy to collect?

• Utility. Will the indicator be able to generate useful information for decision-making and learning?

• Affordability. Can the programme afford to collect the data with the resources it has? Is the data

collected worth the effort and expense?

In summary,

1. Indicators are ‘signals’ to measure expected results at each level of the results chain

2. Indicators should be stated neutrally

3. Indicators at higher and lower outcome levels measure developmental change, whereas

4. indicators at output level demonstrate a completed process

5. Indicators at the higher level outcome are for the targeted population, not the broader population

6. Indicators at the outcome levels should use the unit of percentage and not number

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9. Don’t add too many indicators unnecessarily. Follow the criteria when choosing or developing

your indicators

Congratulations. You have completed Module 2 on developing and selecting performance indicators.

Click on the quiz for this session to test your knowledge on the concepts we have reviewed.

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this session.

In our next module, we will explore Step 3 of an M&E System - HOW TO COLLECT DATA.

Module 3: M&E Plans – Step 2: Developing and Selecting Performance

Indicators

Session 1: Step Two: Developing and Selecting Performance Indicators (Part I)

The aim of this session is to learn how to develop or select appropriate indicators in order to

measure and assess the programme’s expected results.

This session will also provide an opportunity to reflect on how we are demonstrating results through

the use of appropriate quantitative and qualitative indicators.

At the end of this unit, you will be able to develop performance indicators for your results as well as

determine which indicators can be selected for measuring your results.

Developing and selecting Performance Indicators is the second step of establishing and

implementing an integrated M&E System as described in the previous module. These are also

included in your overall monitoring and evaluation plan.

This plan as we have discussed has eight columns and contains all the relevant information to

monitor and measure change in your project or programme.

It is important to note, before we begin, that developing or selecting performance indicators

is not done in isolation. Rather, it is an iterative process which should be revisited, at least on an

annual basis, based on the programme’s experience.

It also involves some thinking ahead to what methodologies might be appropriate for collecting the

information.

An indicator is a signal that shows whether or not progress is being made. Indicators are used as a

means to measure results at each level.

An indicator should usually be:

• unbiased and neutral (there is no direction like the result statement)

• Ideally, not include any targets

In some cases however, indicators do include targets and some donors accept a direction. For the

purposes here however we will not be using targets within the indicator statement. We also suggest

that indicators remain neutral and the change is captured in the result statement itself.

When developing or selecting an indicator, we ask the questions:

“What does the result mean?”

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Indicators are selected for each result statement in the results framework.

For each results, we need to ask, “which indicator would be best to measure and demonstrate the

result has happened?”

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Module 3: M&E Plans – Step 2: Developing and Selecting Performance

Indicators

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الوحدة 1: مقدمة لتصميم وتنفيذ أنظمة الرصد والتقييم

دورة

الجلسة الأولى: مقدمة في دورة تصميم وتنفيذ أنظمة المراقبة والتقييم

يهدف محتوى مقاطع الفيديو هذه إلى توفير بعض الأسس لفهم المفتاح

المفاهيم والمبادئ في إنشاء أنظمة المراقبة والتقييم ، بما في ذلك

نهج الإدارة القائمة على النتائج. والمقصود أن المعلومات الواردة في هذا

سيتم استكمال السلسلة في المستقبل من خلال التدريب في الفصول من قبل أشخاص مختارين من الموارد.

المحتوى الأصلي لهذا التدريب مأخوذ من دليل الميسر التابع لمؤسسة الآغا خان حول التصميم والتصميم

تنفيذ أنظمة المراقبة والتقييم.

على وجه التحديد ، فإن أهداف هذا التدريب هي:

• تطوير فهم للمبادئ التوجيهية لأنظمة المراقبة والتقييم السليمة

• تطوير فهم أساسي لكيفية استخدام الإدارة القائمة على النتائج لتطوير قوة

أنظمة المراقبة والتقييم

• تطوير فهم لكيفية تعزيز أنظمة المراقبة والتقييم في وحداتنا

بحلول نهاية هذه الدورة التدريبية عبر الإنترنت ، من المتوقع أن تكون قادرًا على:

• فهم الفرق بين الرصد والتقييم

• فهم الخطوات العشر لإنشاء نظام للرصد والتقييم

• فهم كيفية وضع خطة للرصد والتقييم

تم تنظيم الدورة في ست وحدات.

• الوحدة 1: مقدمة في المراقبة والتقييم وتصميم وتنفيذ المراقبة &

نظم التقييم

• الوحدة 2: تحديد النتائج والإدارة القائمة على النتائج

• الوحدة 3: كيفية معرفة حدوث التغيير - تطوير واختيار المؤشرات

• الوحدة 4: كيفية جمع المعلومات بما في ذلك مصادر البيانات والمنهجيات والتكرار و

المسؤوليات

• الوحدة 5: توضيح الافتراضات والمخاطر ومراقبتها وتجميع المؤشرات و

تطوير أدوات مراقبة المخرجات

أخيرًا ، ستوفر الوحدة 6 نظرة عامة على الدورة التدريبية.

تتبع كل وحدة وجلسات مرتبطة تنسيقًا مشابهًا ويتم تنظيمها بالطريقة التالية:

• محتوى الجلسة

• موارد إضافية حول موضوعات مختارة لتستكشفها بنفسك

• اختبار في نهاية الوحدة لمعرفة ما إذا كنت قد فهمت المحتوى

• تعليمات للتمرين الذاتي لتطبيق التعلم الجديد الخاص بك. و

كما هو الحال مع أي دورة تدريبية ، هناك قيود على كمية المواد التي يمكن تغطيتها.

لا يخوض محتوى هذا التدريب في التفاصيل بما يتجاوز الخطوة 6 من تصميم المراقبة و

نظام التقييم.

كما أنه لا يغطي الموضوعات المتعلقة بجمع البيانات من خلال الأساليب غير الروتينية مثل الاستطلاعات ،

مناقشات مجموعات التركيز أو المقابلات الفردية. ولا تركز على خطوط الأساس والتأسيس

الأهداف.

حيثما أمكن ، يتم توفير موارد إضافية لاستكشاف هذه الموضوعات بشكل مستقل.

الآن ، لنبدأ. انقر فوق الجلسة 2 في هذه الوحدة لبدء رحلتك في التصميم و

تنفيذ أنظمة المراقبة والتقييم.

الجلسة الثانية: مفاهيم المراقبة والتقييم

مرحبًا بكم في الوحدة الأولى لتصميم وتنفيذ أنظمة المراقبة والتقييم. في

في هذه الجلسة ، سوف نستكشف المفاهيم الأساسية للرصد والتقييم ، والاختلاف و

العلاقة بين الاثنين.

في نهاية هذه الجلسة ، من المتوقع أن تكون قادرًا على تحديد مفاهيم المراقبة

والتقييم. ستتمكن أيضًا من تحديد ما الذي يجعل كل مفهوم مختلفًا عن الآخر.

يُعرَّف الرصد بأنه جمع منهجي للبيانات لمؤشرات مختارة لإثبات

مدى التقدم وتحقيق النتائج واستخدام الأموال المخصصة.

المراقبة هي عملية مستمرة ومنهجية تحدث طوال دورة المشروع.

ويؤكد التعلم من خلال العمل واستخدام المعلومات والأدلة لإبلاغ القرارات.

المراقبة هي أيضًا طريقة لإظهار التقدم مقابل النتائج المتوقعة. هذا يعني الذهاب إلى أبعد من ذلك

ببساطة تتبع الأنشطة والموارد. لكن جمع البيانات والمعلومات لتتبع التقدم

والتغييرات.

في المراقبة ، نطرح السؤال "هل نحرز تقدمًا؟"

تحتاج عمليات المراقبة إلى التنسيق بين جميع القطاعات في البرنامج. هذا يتضمن

التعاون بين القطاعات العاملة في الصحة والتعليم والتنمية الريفية والمجتمع المدني ، في

جمع المعلومات بحيث تكون ذات صلة بالمنظمة ككل.

من المهم أيضًا أن تتذكر أن المراقبة تشمل جميع الموظفين في البرنامج بما في ذلك

فريق الرصد والتقييم وموظفي البرنامج ولا يقوم به شخص واحد أو مجموعة بمفرده.

إنه يشمل الجميع.

بشكل عام ، تم دمج المراقبة في كل ما نقوم به.

من ناحية أخرى ، يُعرَّف التقييم بأنه التقييم المنهجي والموضوعي لعملية مستمرة

أو مشروع أو برنامج أو سياسة مكتملة وتصميمها وتنفيذها ونتائجها. هدفها هو

تحديد مدى الملاءمة والكفاءة والفعالية والاستدامة والتأثير.

يمكن إجراء التقييمات في نقاط مختلفة خلال عمر البرنامج.

التقييمات تساهم في التعلم التنظيمي والتحسين المستمر للنهج و

الاستراتيجيات. إنها ضرورية لإعلام التعلم وإجراء التعديلات على المشاريع المستقبلية و

البرامج

تتجاوز التقييمات مجرد ذكر التقدم المحرز في النتائج ، ولكن أيضًا الطريقة التي يتم بها البرنامج

تم تقديمه والفعالية في كيفية استخدام الموارد

يطرح التقييم الأسئلة ، هل فعلنا الشيء الصحيح ، وكيف يمكن القيام به بشكل أفضل وماذا

هل حدث التغيير الشامل؟

كما لاحظت ، هناك العديد من الاختلافات بين المراقبة والتقييم. هؤلاء

الاختلافات هي بشكل رئيسي في تواترها ، وأعمالها الرئيسية ، والغرض العام ، والتركيز ، وأنواع الأسئلة

يهدف إلى الإجابة ومن هو المسؤول عادة عن كل منها.

لنستعرض كل منطقة ونرى الاختلافات.

المراقبة مستمرة ومنتظمة طوال دورة المشروع أو البرنامج. التقييمات على

من ناحية أخرى ، عادة ما تكون دورية وتحدث على فترات زمنية محددة مثل منتصف المدة أو نهايتها

المشروع أو البرنامج.

يتمثل الإجراء الرئيسي في المراقبة في جمع البيانات الروتينية ، وتحليل هذه البيانات واستخدام

معلومات لإبلاغ القرارات. في التقييم التحليل أكثر عمقا

الغرض العام من المراقبة هو إظهار النتائج والتعلم. كما يبلغ القرار

صنع أثناء التنفيذ. من ناحية أخرى ، يقيم التقييم ما تم تحقيقه

بشكل عام وكيف تم تحقيقه.

من حيث التركيز ، ينظر الرصد في المدخلات والأنشطة والمخرجات والنتائج والمخاطر و

بيئة. يركز التقييم على الفعالية الشاملة (بما في ذلك النتائج) والكفاءة والوصول والتأثير

والاستدامة.

المراقبة تجيب على الأسئلة ، "هل نحرز تقدمًا؟ ما الذي تم تحقيقه؟ و ماذا

هل نتعلم من ناحية أخرى ، يسأل التقييم ، "هل فعلنا الأشياء الصحيحة؟ كيف يمكن أن يكون

عمل أفضل؟ و "ما هو التغيير العام؟"

أخيرًا ، هناك اختلافات في من هو المسؤول بشكل عام عن الرصد والتقييم.

يتولى الرصد مديرو المشروع وموظفو الرصد والتقييم والموظفون الميدانيون والشركاء

وحتى المجتمع. من ناحية أخرى ، لا يتم إجراء التقييم بشكل عام من قبل هؤلاء

تنفيذ البرنامج ، ولكن بالأحرى من قبل مقيّمين خارجيين أو مانحين.

الآن وقد استعرضنا بإيجاز ماهية المراقبة والتقييم والاختلافات بينهما

الاثنين ، دعنا نستكشف المراقبة أكثر قليلاً عن طريق طرح السؤال ، "ماذا نراقب؟"

نحن نراقب أشياء كثيرة طوال دورة المشروع والبرنامج. وتشمل هذه:

• إتمام الأنشطة - هل فعلنا ما قلنا أننا سنفعله؟

• الوقت - كم من الوقت يستغرق إتمام الأنشطة مقابل ما تم التخطيط له

• الموارد - ما هي الموارد التي نستخدمها؟

• الافتراضات - ما هي الافتراضات الموجودة وهل منطق استراتيجياتنا صحيح؟

• المخاطر - ما هي مخاطر تحقيق نتائجنا. و

• النتائج المحققة - ما هي التغييرات والنتائج التي تم تحقيقها ، بما في ذلك التغييرات في الجنس

المساواة؟

لماذا نراقب؟ نحن نراقب ثلاثة أسباب رئيسية - المساءلة والتعلم والقرار

تحضير. دعونا نستكشف كل واحد على حدة.

السبب الأول للمراقبة هو المساءلة. هناك مساءلة تصاعدية وهبوطية

مسئولية.

المساءلة التصاعدية للمانحين أو مجلس الإدارة. المساءلة التنازلية هي المستهدفة

المجتمعات والمنظمات الأخرى وشركائنا.

وهذا يعني أن البيانات التي يتم جمعها من خلال المراقبة يتم نشرها إلى الجهات المانحة أو الجهات المانحة

مجلس الإدارة ونزولاً إلى المجتمعات والمنظمات والشركاء.

السبب الثاني للمراقبة هو التعلم. تساعدنا المراقبة من أجل التعلم على تحديد

التغييرات ، إن وجدت ، وتحديد نقاط القوة والضعف في تدخلاتنا والتمكن من التعلم

منهم من أجل إجراء تعديلات وتحسين برامجنا بناءً على المعلومات

جمعت. بعبارة أخرى اتخاذ القرار - السبب الثالث للمراقبة المنتظمة.

لذلك يتم المراقبة لكل من الجماهير الخارجية والتعلم الداخلي واتخاذ القرار.

المهم أن نتذكر أن كل فرد داخل المنظمة هو جزء من هذه العملية وهي

يجب دمجها في الثقافة التنظيمية.

مبروك. لقد أكملت الجلسة الثانية حول مفاهيم وتعاريف المراقبة و

تقييم. في جلستنا القادمة ، سوف ننظر في الخطوات العشر في إنشاء المراقبة و

نظام التقييم.

لمزيد من المعلومات والموارد الإضافية حول مفاهيم المراقبة والتقييم ، انقر فوق

قسم الموارد لهذه الدورة.

الجلسة 3: إنشاء نظام للرصد والتقييم (الجزء الأول)

مرحبًا بكم في الجلسة الثالثة - إنشاء نظام للرصد والتقييم. سنقوم في هذه الدورة

مراجعة الخطوات الست الأولى المتضمنة في إنشاء نظام قوي للرصد والتقييم.

في نهاية هذه الجلسة ، من المتوقع أن تكون على دراية ببعض الخطوات المتبعة

إنشاء نظام للرصد والتقييم. ومن المتوقع أيضًا أن تصبح أكثر

مرتاحًا لإنشاء أو تعزيز الأنظمة الحالية في برنامجك ووحدتك الخاصة

يتم تعريف نظام المراقبة والتقييم على أنه نظام لجمع واستخدام المعلومات حول

تقدم مشروع أو برنامج.

نحن نجمع هذه المعلومات ونستخدمها لتحقيق الهدف العام المتمثل في تحسين المشروع أو البرنامج.

الغرض من إنشاء نظام للرصد والتقييم هو وجود إطار منظم في

من أجل التخطيط المنتظم للبيانات التي يتم جمعها. عندما يتم جمعها. كم مرة يتم جمعها.

كيف سنجمعها. كيف سنحلل البيانات ، وأخيرًا كيف سنستخدمها لإبلاغ القرار

تحضير.

من المهم أن تضع في اعتبارك أيضًا أن هذا النظام يعمل كنظام اتصال من أجل

نشر المعلومات صعودًا وهبوطًا على مختلف أصحاب المصلحة.

أنه يركز على مستوى البرنامج وليس فقط المشاريع الفردية.

أنه ليس مجرد نظام إدارة معلومات ، بل هو الخطة الشاملة والخطوات المتخذة

تنفيذ هذه الخطة.

بشكل عام ، لا يعد نظام المراقبة والتقييم إطارًا قائمًا بذاته ، ولكنه إطار قائم بذاته

مندمجة في الهيكل التنظيمي والعمليات.

بشكل عام ، هناك عشر خطوات لإنشاء نظام قوي للرصد والتقييم.

في سياق الشرائح القليلة التالية ، سنراجع كل خطوة من هذه الخطوات بإيجاز.

ستدخل الوحدة التالية في مزيد من التفاصيل حول بعض هذه الخطوات ، لذا لا تقلق إذا كان لديك

فقدت شيئا ما.

قبل البدء ، من المهم ملاحظة أن نظام الرصد والتقييم الناجح يكون ممكنًا فقط عندما

هنالك:

• الالتزام والأولوية من الإدارة إلى المراقبة والتقييم

• الموارد المالية المتاحة لجمع البيانات وتحليلها وإعداد التقارير

• الموارد البشرية المتاحة مثل الوقت والقدرة الفنية للرصد والتقييم

طاقم عمل

• هناك فهم مشترك لأهمية العملية المنهجية في إبلاغ القرارات

و التعلم؛ و

• إستراتيجية برنامجية واضحة ومحدثة يمكن بناء نظام المراقبة والتقييم

على

الآن ، دعنا نراجع كل خطوة بإيجاز.

في الخطوة الأولى ، نسأل السؤال ، "كيف يبدو التغيير؟"

يتضمن ذلك تحديد التغيير (أو النتيجة) الذي نتوقع رؤيته كنتيجة لأنشطتنا ،

الاستراتيجيات والتدخلات. من المهم أن تتذكر أن التغييرات لا تكون أبدًا محايدة بين الجنسين

لذلك ننظر أيضًا إلى الآثار المترتبة على المساواة بين الجنسين. أيضا لا تنس التفكير من خلال البيئة

الآثار عند الاقتضاء.

كما يتضمن تحديد الأولويات الاستراتيجية للبرنامج مثل القطاعية الوطنية

خطط التنمية واستراتيجيات الوحدة القطرية وغيرها.

من الناحية العملية ، تتضمن هذه الخطوة تطوير إطار النتائج

في الخطوة الثانية نسأل ، "كيف نعرف أن التغيير قد حدث بالفعل؟"

في هذه الخطوة نختار أو نطور مؤشرات لقياس النتائج وتلك التي يجب مراقبتها

المخرجات والأنشطة والمدخلات والمخاطر.

تتضمن الخطوة الثالثة جمع البيانات لإثراء مؤشراتنا.

هنا نحدد كيفية جمع البيانات ، ومن أين ستأتي هذه البيانات. اتخاذ القرار

من سيجمع البيانات ويحللها ويبلغ عنها. ومتى ستكون البيانات الخاصة بكل مؤشر

جمعت.

الخطوة الرابعة هي توضيح المخاطر والافتراضات. هنا نحدد افتراضات البرنامج ،

تحديد المخاطر الداخلية والخارجية المحتملة التي قد تمنع البرنامج من تحقيقها

النتائج المتوقعة ، بما في ذلك المخاطر المرتبطة بتحقيق نتائج المساواة بين الجنسين. عمليا

بالحديث ، في هذه الخطوة نطور مصفوفة إدارة المخاطر والمراقبة الخاصة بنا.

تتضمن الخطوة التالية تجميع مؤشراتنا لتحديد المؤشرات التي يمكن جمعها في نفس الوقت

الوقت من قبل نفس الشخص ومن الناحية المثالية باستخدام نفس الأدوات.

في هذه الخطوة ، نقوم أيضًا بتعيين المؤشرات التي سنجمعها في دراسات دورية.

الخطوة السادسة هي عندما نصمم أدوات جمع البيانات ، بشكل أساسي لمراقبة المخرجات. اختبر هذه الأدوات مسبقًا

وجمع بيانات المراقبة الروتينية الخاصة بنا.

هنا أيضًا نصمم أي أدوات دراسة ، عند الاقتضاء ، ونختبرها أيضًا.

حتى هذه النقطة ، قمنا بمراجعة الخطوات من 1 إلى 6 بإيجاز في إنشاء المراقبة و

نظام التقييم. في الجلسة التالية ، سنستمر في الخطوات من 7 إلى 10 من إنشاء ملف

نظام المراقبة والتقييم.

الجلسة 4: إنشاء نظام للرصد والتقييم (الجزء الثاني)

مرحباً بكم في الجلسة 4 - الجزء الثاني في إنشاء نظام للرصد والتقييم. في ال

بالفيديو السابق قمنا بمراجعة الخطوات من 1 إلى 6 لنظام الرصد والتقييم. في هذه الدورة سنواصل مع

مراجعة الخطوات من 7 إلى 10.

تتضمن الخطوة السابعة من نظام الرصد والتقييم جمع البيانات وإدارتها.

في هذه الخطوة ، نقوم بما يلي:

• جمع البيانات الروتينية لمخرجاتنا وأنشطتنا وحتى بعض نتائجنا.

• جمع أو تحديد البيانات الأساسية لدينا

• تحديد الأهداف على أساس البيانات الأساسية التي تم جمعها

• جمع البيانات الدورية من خلال الدراسات. يمكن الاستعانة بمصادر خارجية لهذه الدراسات جزئيًا اعتمادًا على ما

يتم جمع بيانات المستوى أو القدرات الداخلية والموارد المتاحة في المنظمة

• ضمان جودة البيانات. على وجه التحديد موثوقية وصحة وتوقيت جمع البيانات ؛ و

• خلال هذه المرحلة ، نضمن أيضًا تنظيف البيانات وإدخالها وإدارتها بشكل مناسب

قواعد البيانات وأنظمة الأرشفة.

الخطوات الثلاث الأخيرة في إنشاء النظام - الخطوات 8 و 9 و 10 تكون بشكل عام عند التقييم ،

التقييم والتعلم.

الخطوة الثامنة على سبيل المثال ، هي الخطوة التي نحلل فيها بياناتنا ونفحص الاتجاهات والمعنى

وراء البيانات التي تم جمعها في الخطوات السابقة.

يمكن إجراء هذا التحليل داخليًا أو خارجيًا اعتمادًا على مدى تعقيد البيانات

في الخطوة 9 ، نقوم بتفسير هذه البيانات ، وتجميع البيانات وتقديم البيانات التي تم تحليلها بشكل واضح و

طريقة متماسكة. يتم ذلك من خلال عرض البيانات على الرسوم البيانية أو في الجداول حسب

الجماهير التي نحاول الوصول إليها.

في تفسير البيانات ، تعتبر الأطر الزمنية المستخدمة مهمة والإبلاغ عن البيانات في الوقت المناسب

طريقة حاسمة. يجب أيضًا الإبلاغ عن استخدامات الأطر الزمنية عند الإبلاغ عن النتائج.

في الخطوة الأخيرة ، نستخدم البيانات لإثراء التعلم.

على وجه التحديد:

• استخدام النتائج للتعلم وتحسين الأداء

• توصيل النتائج إلى الجماهير الخارجية

• إجراء تعديلات واعتماد الدروس للبرمجة المستقبلية

• يتم القيام بذلك لضمان المساءلة أمام جميع أصحاب المصلحة

باختصار ، يتضمن إنشاء وتنفيذ نظام للرصد والتقييم عشر خطوات كما رأينا في

الجزء الأول والجزء الثاني من مقاطع الفيديو هذه.

تستغرق كل خطوة من هذه الخطوات وقتًا وتتطلب الالتزام والأولوية من الوحدة.

من أجل ضمان نجاح نظام مراقبة وتقييم مفيد ، هناك العديد منها

العوامل المطلوبة:

• الجاهزية - هل لدينا الموارد البشرية والمالية اللازمة المتاحة

• الملكية - هل يرى الأشخاص المهمون الحاجة إلى النظام؟ هل لهم رأي في بناء

نظام؟

• الإدارة والصيانة - هل لدينا المهارات المختصة والموارد المالية

إدارة وصيانة النظام؟

• استخدام المعلومات - هل يتم جمع الكمية الصحيحة من البيانات؟ هل هناك الكثير من البيانات

لا يتم استخدامها لإبلاغ النتائج والتعلم؟

• جودة المعلومات - هل البيانات موثوقة وهل تقيس النتائج المرجوة. وأخيرًا

• الاستدامة - إذا كان هناك تغيير في القيادة أو الموظفين في وحدات المراقبة؟ سوف النظام

الاستمرار في العمل بدونهم؟

مبروك. لقد أكملت الجلسة 4 بشأن الخطوات العشر لإنشاء نظام للرصد والتقييم.

لقد أكملت أيضًا بنجاح الوحدة 1 من هذه الدورة.

لمزيد من المعلومات والموارد الإضافية حول إنشاء أنظمة المراقبة والتقييم ،

انقر فوق قسم الموارد لهذه الجلسة.

أيضًا ، انقر فوق الاختبار لهذه الجلسة لاختبار معرفتك بالمفاهيم التي راجعناها فيها

هذه الوحدة.

الوحدة 2: مقدمة لتصميم وتنفيذ أنظمة الرصد والتقييم

دورة

الجلسة 1: الخطوة الأولى: تحديد النتائج والإدارة القائمة على النتائج وأطر النتائج

(الجزء الأول)

مرحبًا بكم في الجزء الأول من الوحدة 2 - الإدارة القائمة على النتائج وأطر النتائج. في هذا

سنستعرض في الجلسة الخطوة الأولى في إنشاء نظام للرصد والتقييم - ماذا يفعل

تغيير الشكل وتحديد النتائج

في نهاية هذه الجلسة من المتوقع أن تقوم بما يلي:

• الحصول على فهم أكبر للإدارة القائمة على النتائج (أو RBM)

• فهم العلاقة بين السبب والنتيجة بين النتائج

قبل أن نبدأ ، من المهم أن نتذكر أنه في حين أن الإدارة القائمة على النتائج (أو RBM) هي

نهج الإدارة المشترك ، قد يستخدم مختلف المستخدمين مصطلحات مختلفة.

سنستخدم في هذه الدورة المصطلحات:

• إطار النتائج للإشارة إلى الصور المرئية للعلاقة بين الأنشطة والمخرجات

والنتائج. قد يشير الآخرون إلى هذا كنموذج منطقي.

• خطة M&E للإشارة إلى مصفوفة من ثمانية أعمدة تحدد النتائج ومؤشرات الأداء

خط الأساس والأهداف ومصادر المعلومات وطرق الجمع والتكرار والمسؤولية.

قد يشير آخرون إلى هذا على أنه إطار قياس الأداء

لنبدأ بمراجعة تعريف النتيجة. النتيجة هي تغيير يمكن وصفه و

تقاس. يتأثر بشكل مباشر أو غير مباشر بتدخلات برنامجنا و / أو غيرها

عوامل خارجية

هناك مستويات مختلفة من النتائج:

- هدف

- مخرجات أعلى مستوى

- مخرجات المستوى الأدنى

- النواتج

تذكر أن الجهات المانحة وأصحاب المصلحة الآخرين قد يستخدمون مصطلحات مختلفة مثل المستوى المتوسط

النتيجة أو النتيجة متوسطة المدى تعني نفس الشيء مثل نتائج المستوى الأعلى. ما هو

من المهم أن نتذكر أنه بغض النظر عن المصطلحات ، لا يزال هناك سبب ونتيجة

العلاقة التي تحدث.

هذه مرتبطة ببعضها البعض من خلال سلسلة النتائج. سلسلة النتائج هي علاقة السبب والنتيجة

بين الأنشطة والمخرجات والنتائج.

دعونا نلقي نظرة على سلسلة النتائج بمزيد من التفصيل وكيفية ارتباطها ببعضها البعض.

- قبل تجميع النتائج ، يلزم توفير مدخلات مالية وبشرية ومادية. هؤلاء

المدخلات تغذي مباشرة الأنشطة. المدخلات ليست جزءًا من إطار النتائج ، ولكنها معروضة هنا

لتوضيح كيفية مساهمتهم في الأنشطة.

- الأنشطة هي الإجراءات المتخذة لإنتاج النواتج. الأنشطة هي "ما" ستتخذ التدخلات

مكان. من المهم أن نتذكر أن هذه ليست نتائج.

- النواتج هي المنتجات أو الخدمات المباشرة الناشئة عن مجموعة أو مجموعة من الأنشطة. في بعض

ومع ذلك ، اعتمادًا على الجهة المانحة ، فإن المخرجات هي مجرد نشاط مكتمل وليست كذلك

تمثل أي تغيير. من المهم أيضًا تذكر أن المخرجات ملموسة وبالتالي فهي

يمكن وضعها في الميزانية.

- النتائج ، المستوى الأعلى والأدنى ، هي التغييرات التي تحدث بمجرد تحقيق المخرجات. هم

غالبًا ما توصف بأنها تغييرات مستدامة في السلوك أو الممارسات أو حالة الأفراد أو الكيانات أو

الأنظمة. يمكن أن تكون هذه النتائج إما قصيرة الأجل أو متوسطة الأجل.

- أخيرًا ، يتم تعريف الهدف على أنه تغيير يحدث كنتيجة للنتائج المحققة. إنها

غالبًا ما يتم وصفه بأنه تغيير مستدام للدولة والأفراد والكيانات والأنظمة ويحدث في

طويل الأمد.

دعنا نلقي نظرة على مثال لسلسلة نتائج من مشروع للمياه والصرف الصحي.

في سلسلة النتائج هذه (أو تيار النتائج) يمكننا أن نرى أن المخرجات تؤدي مباشرة إلى نتيجة

زيادة توافر المياه الصالحة للشرب واستخدامها. وهذا بدوره يؤدي إلى التغيير المتوقع لخفضها

الإصابة بالأمراض التي تنقلها المياه. والتي يمكن أن تسهم في تحسين الحالة الصحية.

من المهم أن نتذكر أن المنطق ليس دائمًا خطيًا - من مجموعة واحدة من المخرجات إلى نتيجة واحدة.

في الواقع ، يمكن لأكثر من نتيجة واحدة أن تساهم في نتيجة أخرى على مستوى أعلى. في هذا المثال

يمكننا أن نرى أن نتيجتين أقل يمكن أن تساهم في نتيجة واحدة أعلى. ومع ذلك، في

من خلال تطوير إطار عمل للنتائج ، فإننا نأخذ في الاعتبار عمومًا كل مسار نتائج على حدة. ال

الجمع بين تيارات النتائج هذه معًا يساهم في تحقيق الهدف.

في حين أن هذا قد يكون أحد عيوب الإدارة القائمة على النتائج ، فإن استخدام إطار عمل النتائج لا يزال وسيلة مفيدة

تصور المنطق بصريا.

يجب أن يكون أي مشروع أو برنامج تصممه منطقيًا من حيث النتائج التي تهدف إلى تحقيقها

من الطرق المفيدة للتأكد من أن التقدم من الأنشطة إلى الهدف منطقيًا هو اختباره باستخدام "If

ثم "لكل بث نتائج. يتيح لك ذلك معرفة ما إذا كانت الافتراضات الأساسية لنتائجك

السلسلة صحيحة.

على سبيل المثال ، إذا تم إنجاز المخرجات ، فيجب تحقيق نتائج المستوى الأدنى.

وإذا تم تحقيق نتائج المستوى الأدنى ، فمن المتوقع أن تكون النتائج على مستوى أعلى

سوف تتحقق وهكذا دواليك.

في سلسلة النتائج ، تكون قدرة البرنامج على التحكم في النتائج عالية المستوى أو التأثير عليها أقل

من قدرته على التأثير على نتائج المستوى الأدنى.

بشكل عام ، كلما تقدمت في سلسلة النتائج ، قل تأثيرك وزاد

الوقت المستغرق لتحقيق النتيجة المتوقعة.

يقودنا هذا إلى نهاية الجلسة الأولى حول الإدارة القائمة على النتائج. سنفعل في الجلسة القادمة

استكشاف كيفية تحديد نتائجنا وتطوير بيانات نتائج واضحة.

الجلسة 2: الخطوة الأولى: تحديد النتائج والإدارة القائمة على النتائج وأطر النتائج

(الجزء 2)

مرحبًا بعودتك. في الجلسة الأخيرة ، نظرنا في سبب وتأثير النتائج وكيف تتناسب معها

معاً. سنستمر في تحديد وتطوير بيانات النتائج.

عند تطوير بيانات النتائج ، يجب أن تكون SMART. هذا يعنى:

ق - يجب أن يكون بيان النتائج محددًا من حيث ما يتوقع تغييره. من سيفعل ذلك

فائدة؟ أين سيحدث التغيير المتوقع؟

م - يجب أن تكون النتيجة قابلة للقياس. هذا يعني أن المعلومات عن التغيير المتوقع يمكن أن تكون

جمعت لإثبات التغيير.

أ- النتائج يجب أن تكون قابلة للتحقيق. هل هو ضمن نطاق البرنامج؟ هل سيتحقق

ضمن الإطار الزمني وبالموارد المتاحة؟

R - يجب أن تكون النتائج ذات صلة. يجب أن تعكس الاحتياجات والأولويات بين الهدف

مجتمع. هل من الممكن المساهمة في التغيير الحاصل؟

تي - النتيجة محددة زمنياً. هذا يعني النظر في الإطار الزمني بالإضافة إلى القدرة على تتبع

التغير مع مرور الوقت.

تتم كتابة جمل النتيجة بشكل عام باستخدام "فعل اتجاهي" في الفعل الماضي. هذه الاتجاهات

يمكن أن تكون موجبة أو سلبية. على سبيل المثال ، هناك شيء ما "زاد" أو "تم تحسينه" مقابل

شيء "انخفض" أو "انخفض".

ومن الأمثلة على ذلك:

• زيادة الأمن الغذائي للأسر المستهدفة في البلد العاشر

• تعزيز القدرات المؤسسية والإدارية للمنظمة X

• الحد من وفيات الأطفال في المنطقة X

من المهم أن تتذكر أن كل عبارة يجب أن تتضمن ما يلي:

- ما التغيير الذي تريد رؤيته؟ على سبيل المثال ، التمكين الاقتصادي المعزز

- لمن يقصد التغيير؟ على سبيل المثال ، التمكين الاقتصادي المعزز للمستهدفين

الأسر ، وخاصة الأسر التي تعيلها إناث

- أين يتوقع حدوث هذا التغيير؟ على سبيل المثال ، التمكين الاقتصادي المعزز ل

الأسر المستهدفة في منطقة معينة.

لا يتم تضمين "متى" عادةً في بيان النتيجة ، خاصةً للنتائج ذات المستوى الأعلى. في

في بعض الحالات ، يمكن أن تتضمن النتائج ذات المستوى الأدنى أو حتى المخرجات فترة زمنية ، خاصة في الحالات التي يكون فيها

التدخل هو تجريبي أو مؤقت.

أخيرًا ، عند كتابة بيانات النتائج ، يجب أن نكون واضحين بشأن التغيير الذي نريد رؤيته. شروط مثل

مثل "الدعم" و "البيئة التمكينية" و "التعزيز" و "التمكين الاقتصادي" وما إلى ذلك

محددة بوضوح. يشار إلى هذا على أنه تفعيل النتيجة - تحديد المقصود على وجه التحديد

بالتغيير.

باستخدام نفس مثالنا على التمكين الاقتصادي المعزز للأسر المستهدفة ، على وجه الخصوص

النساء في المنطقة X ، قد يعني تفعيل هذا:

• حالة ثروة الأسرة مثل الدخل والمدخرات ومستوى الدين وملكية الأصول

• اتخاذ القرار في الأسرة

• الأمن الغذائي \* واستراتيجيات التكيف. كما ترى ، حتى الأمن الغذائي سيحتاج إلى مزيد من التحديد.

في ملخص:

إطار النتائج هو تصوير مرئي لاستراتيجيتك ومنطق التغييرات التي تتوقعها

انظر النتائج مرتبطة ببعضها البعض في سلسلة نتائج.

هناك العديد من المصطلحات المستخدمة للغة النتائج من قبل مختلف الجهات المانحة. المفتاح هو التأكد

اتساق المصطلحات والتعريف

نادرًا ما تحدث النتائج بطريقة خطية بسيطة مع اتباع أحدهما للآخر بطريقة "if-then" البسيطة

نمط. بدلاً من ذلك ، غالبًا ما تكون النتائج مترابطة وأحيانًا تتجنب خطية النتائج

سلسلة.

يجب أن تكون النتائج S.M.A.R.T قدر الإمكان حتى لا يكون هناك التباس في ماهية التغيير المتوقع.

في حالة وجود أي غموض ، تأكد من تحديد بيان النتيجة في حاشية سفلية أو

الوثيقة المقابلة.

قدرة البرنامج على التحكم في النتائج عالية المستوى أو التأثير عليها أقل من قدرته على ذلك

تؤثر على نتائج المستوى الأدنى.

مبروك. لقد أكملت الوحدة 2 حول الإدارة والنتائج القائمة على النتائج

إطار أعمال.

لمزيد من المعلومات والموارد الإضافية حول الإدارة القائمة على النتائج ، انقر فوق

قسم الموارد لهذه الدورة.

بالنسبة لهذه الوحدة ، يتوفر أيضًا تمرين ذاتي التوجيه في قسم [التمارين] لهذا القسم.

نحن نشجعك على قضاء بعض الوقت في إجراء هذا التمرين لتطبيق بعض من ميزاتك الجديدة

معرفة.

الوحدة 3: خطط M&E - الخطوة 2: تطوير واختيار الأداء

المؤشرات

الجلسة 1: الخطوة الثانية: تطوير واختيار مؤشرات الأداء (الجزء الأول)

الهدف من هذه الجلسة هو تعلم كيفية تطوير أو اختيار المؤشرات المناسبة من أجل

قياس وتقييم النتائج المتوقعة للبرنامج.

ستوفر هذه الجلسة أيضًا فرصة للتفكير في كيفية إظهار النتائج من خلال

استخدام المؤشرات الكمية والنوعية المناسبة.

في نهاية هذه الوحدة ، ستكون قادرًا على تطوير مؤشرات الأداء لنتائجك أيضًا

تحديد المؤشرات التي يمكن اختيارها لقياس نتائجك.

يعد تطوير واختيار مؤشرات الأداء الخطوة الثانية في إنشاء و

تنفيذ نظام رصد وتقييم متكامل كما هو موضح في الوحدة السابقة. هذه هي أيضا

المدرجة في خطة الرصد والتقييم الشاملة الخاصة بك.

تحتوي هذه الخطة كما ناقشناها على ثمانية أعمدة وتحتوي على جميع المعلومات ذات الصلة بـ

مراقبة وقياس التغيير في مشروعك أو برنامجك.

من المهم أن نلاحظ ، قبل أن نبدأ ، تطوير أو اختيار مؤشرات الأداء

لا يتم بمعزل عن الآخرين. بدلاً من ذلك ، إنها عملية تكرارية يجب إعادة النظر فيها ، على الأقل في

على أساس سنوي ، بناءً على تجربة البرنامج.

كما يتضمن أيضًا بعض التفكير المسبق بشأن المنهجيات التي قد تكون مناسبة لتجميع

معلومة.

المؤشر هو إشارة توضح ما إذا كان قد تم إحراز تقدم أم لا. يتم استخدام المؤشرات كملف

يعني قياس النتائج في كل مستوى.

يجب أن يكون المؤشر عادة:

• غير متحيز ومحايد (لا يوجد اتجاه مثل بيان النتيجة)

• من الناحية المثالية ، لا تتضمن أي أهداف

ومع ذلك ، في بعض الحالات ، تشمل المؤشرات أهدافًا ويقبل بعض المانحين الاتجاه. بالنسبة إلى

أغراض هنا ولكننا لن نستخدم الأهداف في بيان المؤشر. نقترح أيضا

أن المؤشرات تظل محايدة ويتم تسجيل التغيير في بيان النتيجة نفسه.

عند تطوير أو اختيار مؤشر ، نطرح الأسئلة التالية:

"ماذا تعني النتيجة؟"

"كيف أعرف أن التغيير قد حدث؟"

يتم اختيار المؤشرات لكل بيان نتيجة في إطار النتائج.

لكل نتيجة ، نحتاج إلى أن نسأل ، "ما هو المؤشر الأفضل لقياس وإثبات

هل حدثت النتيجة؟ "

إذن ، كم عدد المؤشرات التي يجب أن نختارها لكل نتيجة؟

الجواب هو الرقم المطلوب لإثبات النتيجة بشكل مناسب.

مع تقدمنا ​​في سلسلة النتائج ، عادةً ما نضيف المزيد من المؤشرات

على مستوى المخرجات ، يمكن أن يكون مؤشر واحد كافياً

بشكل عام ، هو توازن بين ما "نحتاج" إلى معرفته وما "نريد" أن نعرفه. وجود أيضا

ومع ذلك ، فإن العديد من المؤشرات ستزيد من عبء الرصد.

هناك نوعان من المؤشرات - تلك على مستوى النتائج وتلك على مستوى المخرجات.

مؤشرات النتيجة تقيس التغيير (أو بيان النتيجة)

غالبًا ما يستخدمون وحدة النسبة المئوية أو المتوسط ​​أو المتوسط ​​وليس العدد.

المؤشرات على مستوى النتائج الأعلى هي أيضا للسكان المستهدفين ، وليس الأوسع نطاقا

سكان

مؤشرات المخرجات من ناحية أخرى هي تلك التي يمكنك التخطيط لها في ميزانيتك

إنهم لا يقيسون أي تغيير. بدلا من ذلك ، فإنها تثبت أن العملية قد اكتملت

غالبًا ما تستخدم المؤشرات في هذا المستوى وحدة العدد لأننا ببساطة نوضح هذه العملية

اكتمل.

على سبيل المثال،

على مستوى النتائج ، قد نرغب في قياس التغيير في الأمن الغذائي. قد نختار

المؤشر: النسبة المئوية للأسر التي تتمتع بالأمن الغذائي.

على مستوى المخرجات ، قد نرغب في معرفة عدد الأشخاص الذين تم تدريبهم في موضوع معين. نحن سوف

ثم حدد مؤشرًا مثل: عدد الرجال والنساء المتدربين على إنشاء حديقة منزلية

يمكن أن تكون المؤشرات كمية أو نوعية.

المؤشرات الكمية تقيس الكمية وهي عددية. يمكن أن تشمل الأمثلة على ذلك:

• رقم ال

• تردد ال

• نسبة من

• نسبة ال

• الوسيط ، المتوسط ​​(أو المتوسط) ، الوضع

من ناحية أخرى ، تقيس المؤشرات النوعية التصورات أو المواقف أو الأحكام. أمثلة على

وتشمل هذه:

• تصور

• وجود

• نوع من

• جودة

• مدى

• مستوى

• الدرجة العلمية التي

لقد وصلنا إلى نهاية الجزء الأول من تطوير واختيار مؤشرات الأداء. في منطقتنا

الجلسة التالية سنستمر في هذا الموضوع ونستكشف المزيد عن كيفية تطوير أو اختيار سلعة

مؤشر ومعايير اختيار المؤشرات.

الجلسة 2: الخطوة الثانية: تطوير واختيار مؤشرات الأداء (الجزء الثاني)

Welcome to part two of developing and selecting performance indicators.

In the previous session we talked about what is an indicator and types of indicators.

In this session we will continue to learn about what makes a good indicator, disaggregation of

indicators and criteria for selection of indicators.

هيا نبدأ.

A good indicator generally contains five components.

First, determine what you are measuring. In our example, we want to measure school enrolment

Second, add a unit. For example, number of students enrolled

Third, add quality, specifics and the universe. For example, # of students enrolled in primary school

Fourth, add a time frame such as # of students enrolled in primary school each semester. الوقت

frame is dependent on the sector so at times it is optional to include.

Finally, add your disaggregation. In our example we add disaggregation by sex and district

This process would apply also for qualitative indicators. The key is to be specific and to include all

معلومات ذات صلة

When developing or selecting indicators there are other things to keep in mind.

As we mentioned, indicators should be disaggregated. This means that the indicator can capture

different sensitivities such as sex, age group, economic class, geography and others which may be

appropriate to your programme.

Examples of disaggregation can include:

• Disaggregation by sex and age group for an indicator capturing how many youth were trained on

HIV/AIDS prevention

• Disaggregation by household type and geographic area for an indicator measuring households

with sufficient food

Where indicators are used to count people, they must always be sex-disaggregated to demonstrate

that both men/boys and women/girls are benefitting equally

Finally, when we select or develop indicators, there are also key criteria we need to follow:

• Validity. Is the indicator valid? Does the indicator measure the result?

• Reliable. Is the indicator a consistent measure over time? Can we use the indicator to measure

trends over time? And is the indicator sensitive to change over time?

• Simplicity. Will the data be easy to collect?

• Utility. Will the indicator be able to generate useful information for decision-making and learning?

• Affordability. Can the programme afford to collect the data with the resources it has? Is the data

collected worth the effort and expense?

في ملخص،

1. Indicators are ‘signals’ to measure expected results at each level of the results chain

2. Indicators should be stated neutrally

3. Indicators at higher and lower outcome levels measure developmental change, whereas

4. indicators at output level demonstrate a completed process

5. Indicators at the higher level outcome are for the targeted population, not the broader population

6. Indicators at the outcome levels should use the unit of percentage and not number

7. Indicators should be disaggregated, where relevant

8. Where indicators are used to count people, they should always be sex-disaggregated

9. Don’t add too many indicators unnecessarily. Follow the criteria when choosing or developing

your indicators

تهانينا. You have completed Module 2 on developing and selecting performance indicators.

Click on the quiz for this session to test your knowledge on the concepts we have reviewed.

For further information and additional resources on indicators, click on on the resources section for

هذه الدورة.

In our next module, we will explore Step 3 of an M&E System - HOW TO COLLECT DATA.

Module 3: M&E Plans – Step 2: Developing and Selecting Performance

المؤشرات

Session 1: Step Two: Developing and Selecting Performance Indicators (Part I)

The aim of this session is to learn how to develop or select appropriate indicators in order to

measure and assess the programme’s expected results.

This session will also provide an opportunity to reflect on how we are demonstrating results through

the use of appropriate quantitative and qualitative indicators.

At the end of this unit, you will be able to develop performance indicators for your results as well as

determine which indicators can be selected for measuring your results.

Developing and selecting Performance Indicators is the second step of establishing and

implementing an integrated M&E System as described in the previous module. These are also

included in your overall monitoring and evaluation plan.

This plan as we have discussed has eight columns and contains all the relevant information to

monitor and measure change in your project or programme.

It is important to note, before we begin, that developing or selecting performance indicators

is not done in isolation. Rather, it is an iterative process which should be revisited, at least on an

annual basis, based on the programme’s experience.

It also involves some thinking ahead to what methodologies might be appropriate for collecting the

معلومة.

An indicator is a signal that shows whether or not progress is being made. Indicators are used as a

means to measure results at each level.

An indicator should usually be:

• unbiased and neutral (there is no direction like the result statement)

• Ideally, not include any targets

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At output level, one indicator can be sufficient

Overall, it is a balance between what we “need” to know and what we “want” to know. Having too

many indicators however, will increase the monitoring burden.

There are two types of indicators – those at the outcome level and those at the output level.

Outcome indicators measures the change (or the result statement)

They often use the unit of percentage, average or median and not number.

Indicators at the higher level outcome are also for the targeted population, not the broader

سكان

Output indicators on the other hand are those that you can plan for in your budget

They do not measure any change. Instead, they demonstrate that a process has been completed

Indicators at this level often use the unit of number as we are simply demonstrating that a process

اكتمل.

على سبيل المثال،

At the outcome level we may want to measure a change in food security. We may select the

indicator: percentage of households that are food secure.

At the output level we may want to see how many people are trained in a particular topic. نحن سوف

then select an indicator such as: number of men and women trained in establishing a home garden

Indicators can be either quantitative or qualitative.

Quantitative indicators measure quantity and are numerical. Examples of these could include:

• Number of

• Frequency of

• Percentage of

• Ratio of

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Qualitative indicators on the other hand measure perceptions, attitudes or judgments. أمثلة على

these include:

• Perception of

• Existence of

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• Extent to which

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We have come to the end of part one of developing and selecting performance indicators. في منطقتنا

next session we will continue with this topic and explore further how to develop or select a good

indicator and criteria for selecting indicators.

Session 2: Step Two: Developing and Selecting Performance Indicators (Part II)

Welcome to part two of developing and selecting performance indicators.

In the previous session we talked about what is an indicator and types of indicators.

In this session we will continue to learn about what makes a good indicator, disaggregation of

indicators and criteria for selection of indicators.

هيا نبدأ.

A good indicator generally contains five components.

First, determine what you are measuring. In our example, we want to measure school enrolment

Second, add a unit. For example, number of students enrolled

Third, add quality, specifics and the universe. For example, # of students enrolled in primary school

Fourth, add a time frame such as # of students enrolled in primary school each semester. الوقت

frame is dependent on the sector so at times it is optional to include.

Finally, add your disaggregation. In our example we add disaggregation by sex and district

This process would apply also for qualitative indicators. The key is to be specific and to include all

معلومات ذات صلة

When developing or selecting indicators there are other things to keep in mind.

As we mentioned, indicators should be disaggregated. This means that the indicator can capture

different sensitivities such as sex, age group, economic class, geography and others which may be

appropriate to your programme.

Examples of disaggregation can include:

• Disaggregation by sex and age group for an indicator capturing how many youth were trained on

HIV/AIDS prevention

• Disaggregation by household type and geographic area for an indicator measuring households

with sufficient food

Where indicators are used to count people, they must always be sex-disaggregated to demonstrate

that both men/boys and women/girls are benefitting equally

Finally, when we select or develop indicators, there are also key criteria we need to follow:

• Validity. Is the indicator valid? Does the indicator measure the result?

• Reliable. Is the indicator a consistent measure over time? Can we use the indicator to measure

trends over time? And is the indicator sensitive to change over time?

• Simplicity. Will the data be easy to collect?

• Utility. Will the indicator be able to generate useful information for decision-making and learning?

• Affordability. Can the programme afford to collect the data with the resources it has? Is the data

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في ملخص،

1. Indicators are ‘signals’ to measure expected results at each level of the results chain

2. Indicators should be stated neutrally

3. Indicators at higher and lower outcome levels measure developmental change, whereas

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5. Indicators at the higher level outcome are for the targeted population, not the broader population

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9. Don’t add too many indicators unnecessarily. Follow the criteria when choosing or developing

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تهانينا. You have completed Module 2 on developing and selecting performance indicators.

Click on the quiz for this session to test your knowledge on the concepts we have reviewed.

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In our next module, we will explore Step 3 of an M&E System - HOW TO COLLECT DATA.

Module 3: M&E Plans – Step 2: Developing and Selecting Performance

المؤشرات

Session 1: Step Two: Developing and Selecting Performance Indicators (Part I)

The aim of this session is to learn how to develop or select appropriate indicators in order to

measure and assess the programme’s expected results.

This session will also provide an opportunity to reflect on how we are demonstrating results through

the use of appropriate quantitative and qualitative indicators.

At the end of this unit, you will be able to develop performance indicators for your results as well as

determine which indicators can be selected for measuring your results.

Developing and selecting Performance Indicators is the second step of establishing and

implementing an integrated M&E System as described in the previous module. These are also

included in your overall monitoring and evaluation plan.

This plan as we have discussed has eight columns and contains all the relevant information to

monitor and measure change in your project or programme.

It is important to note, before we begin, that developing or selecting performance indicators

is not done in isolation. Rather, it is an iterative process which should be revisited, at least on an

annual basis, based on the programme’s experience.

It also involves some thinking ahead to what methodologies might be appropriate for collecting the

معلومة.

An indicator is a signal that shows whether or not progress is being made. Indicators are used as a

means to measure results at each level.

An indicator should usually be:

• unbiased and neutral (there is no direction like the result statement)

• Ideally, not include any targets

In some cases however, indicators do include targets and some donors accept a direction. بالنسبة إلى

purposes here however we will not be using targets within the indicator statement. We also suggest

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