Resource Development Foundation (RDF)

Monitoring and Evaluation (M&E) Plan

(2nd Edition)
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About the Monitoring and Evaluation (M&E) Plan

This monitoring and evaluation plan is a guide that explains the goals and objectives of the M&E strategy and its key elements. This M&E plan is like a roadmap that describes how RDF will monitor and evaluate its donor funded, consortium led/funded projects and program. The Micro-Credit Program of RDF will be monitored and evaluated as per the guidelines of MRA and other regulatory authorities. This M&E plan will help define, implement, track and improve a monitoring and evaluation strategy within a particular project or a group of projects; it is explained step by step with all elements and activities that need to happen during the whole project cycle.

All managers and supervisors including the central monitoring unit (PCM Team) based in HQ at Dhaka will be fully involved in developing the detail monitoring and evaluation plan for each project while designing and implementing any project (s). The M&E Plan will help the project managers, supervisors and other staff members associated with the project to get a clear picture of Project Development Objectives (PDOs), Key Performance Indicators (KPIs) and ensure the project is on the right track in order to achieve the expected results and goal by the end of the project duration.

Designing the M&E Plan

Developing an M&E plan is a dynamic and multi-faceted process as it involves merging and connecting different elements of M&E into one holistic system to measure the performance of interventions and impact of a project. It is recommended to design the M&E work plan in a manner that it's flexible so adjustments could be made anytime within the context of the work plan to account for issues that may arise during the M&E process. Following steps to be followed to develop the M&E Plan for both development and emergency projects. All concerned involved in developing/designing a project should conceptualize, understand the project and its underlying problems, including its causes and effects, to be addressed (interventions to undertake) by the Project (s).

(a) Identifying the focal problem and the need for a project

Based on the ground reality, any problem identifications should evidence based to decide the core problem mutually agreed by all team members involved in developing/designing any project. The identified problems to be validated with community and other stakeholder whom RDF will be working with to overcome the problems.

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(b) Planning a project

Once the underlying problem are fully grasped and mapped out its causes
and affects, RDF start planning any project.

Identifying project goals, objectives and inputs/activities

Before starting with the groundwork of M&E plan, it is crucial/important to understand where RDF needs to go and how is it going to get there. This is possible by identifying clear and concise goals, objectives and relevant activities.

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(c) Identifying key players

This step involves identifying key internal and external stakeholders who will be involved in the project or who will benefit from the project. The key stakeholders include the project team, donors, stakeholders in the wider community (community groups, networks, residents etc.), partner organisations, local and national policy makers, other government bodies/ministries and the project beneficiaries.

(d) Understanding the overall context

It is important to understand the political and administrative structures of the community where your project will take place, along with the roles and influences of existing policies that may affect project implementation. Likewise, it is also recommended to start thinking about the potential risks and unexpected circumstances that might arise during project implementation, for eg., any reluctance on the key players' part for cooperation etc.

Once a clear picture of the overall goals and objectives of the project are defined, the key players are identified and the context is well understood, it is time to select an appropriate approach and sketch out the detailed design of the implementation plan.

(e) Defining a Monitoring and Evaluation framework

With sufficient background knowledge on the projects, RDF will develop Monitoring & Evaluation Framework which will assist to set goal, objective and expected results/outcome, the measurable indicators, external influences that may hamper the projects' success, to be setout at each stage (to be defined in the Logical Framework),

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It is important to keep in mind that there is no one size fits all when it comes to frameworks. Different kinds of projects use different kinds of frameworks, the best way to determine your ideal type is by understanding the scope of your project and then choosing the one that best fits the purpose. RDF will consider from the following three types of M&E frameworks which are widely used in the development and humanitarian sectors:

Theory of Change – A theory of change ***shows*** a bigger picture (which could sometimes get complex) of all the underlying processes and possible pathways leading to long term behavioral changes in the institutional, individual or community levels, while visualising all the possible evidence and assumptions that are linked to those changes.

Logical Framework (LogFrame)/Logic Model – Unlike the theory of change, a

- LogFrame or a Logic Model is to the point and focuses only on one specific pathway that a project deals with and creates a neat and orderly structure for it. This makes it easier for the project managers and stakeholders to monitor project implementation.

- ***Results Framework –*** A results framework emphasises on results to provide clarity around the key project objectives. In other words, it outlines how each of the intermediate results/ outputs and outcomes relates to and facilitates the achievement of each objective, and how objectives relate to each other and the ultimate goal. Want some tips on how to design a Results Framework? *Click here.*

These three frameworks may have some differences in practice, but there are also some common elements that run through them, like the need for the identification and involvement of key stakeholders; the need for well-defined goals, objectives, activities and outputs, the same general purpose of describing how the project will lead to results and the need for ongoing monitoring and evaluation.

(f) Identifying relevant indicators

Once the program's goals and objectives are defined and an outline of an M&E framework is in place, it is time to define indicators for tracking progress towards achieving those goals. A good mix of ***process, outcome and impact*** indicators is always recommended.

Process indicators track the progress of the project. These indicators will help us get clarity on whether activities are being implemented as planned. On the other hand, ***outcome/result indicators*** track how successful program activities have been at achieving project objectives. Unlike process indicators, these indicators will focus more on what the project will be trying to achieve rather than how it is being achieved. ***Impact indicators*** will

measure the long term goals or impacts of a project which will be mainly used at Post Project Evaluation stage.

(g) Identifying data collection tools and methodologies

After setting monitoring indicators, it identify and collect relevant data to demonstrate the actual outputs and outcome/results of the project interventions against the indicators. M&E team will recommend to involve the project team and stakeholders in the discussion to make the process more participatory. Before collection of Data, clear separation and understanding the qualitative data, quantitative data or a combination of two types of data. With deep consultation between the M&E team and the project implementation team, separate format/tools to be developed for data collection on periodic basis. For process monitoring, RDF project implementation team will keep record mainly of quantitative data on weekly or monthly basis. They will report the compiled data to the Monitoring head through the project managers. RDF will also compile the quantitative data (against the indicators at output and outcome level) and the qualitative data on quarterly and annual basis (can vary on the donors' demand). Based on the findings from the data collected from the field, they will be analyzed and periodic reports will be prepared for the Senior Management and other stakeholders as per the reporting plans.

This is to be note at the beginning of any project, in line with the set indicators, baseline data (from primary and/or secondary or both sources) will be collected for each project.

For monitoring and evaluation of the project performance, the progress/status will be compared with baseline data. The M&E Team in consultation with Project Implementing Team (Managers and supervisors), RDF will define/develop user friendly but most acceptable/recognized method and tools to collect new/monitoring data and the data collection method. The trained team under M&E Unit, the periodic collected data will be analyzed and accordingly the periodic monitoring reports will be prepared. Both the teams will carefully avoid the "data garbage" and only collect the most useful and relevant data. The project team should consider that "data collection" should not be another project in terms of time, money and use of other resources for un-useful/irrelevant data collection.

The source of quantitative and qualitative data collected will be;
- Regular project record
- Surveys through structure/semi-structured questionnaires.

Service delivery records.
- Using various PRA tools
- Focus groups
- Case studies
- Interviews, Workshops, etc.

(h) Reviewing M&E Work Plan on a periodic basis

When the indicators and data collection plans are mapped-out, the M&E Team, Project Managers and Senior Managers of RDF will revisit the M&E plan to see the progress toward the project goals and objectives and will revise it based on the current needs vs actual status of the project to know how well are the activities being implemented. Are they generating intended outcomes or to what extent are our interventions in line with the needs of the community? What needs to be improved, added or changed at this point? How is the project ensuring "value of money", etc.

This is to be noted while developing a project and its budgeting, RDF will put fund/budget for period monitoring of the project activities and also budget allocation for at least one mid-term evaluation and one end of project evaluation", preferably by external evaluator.

The mid-term evaluation, will help analyze and make necessary adjustments in the project activities, implementation strategies to achieve the expected results and ultimate goal of the projects.

(i): Reporting

Once data is gathered and analysed, it must be reported to the relevant members regularly to discuss and interpret findings. The intention of reporting should always be to provide clarity on the most up-to-date results to staff members and senior management including other stakeholders about the progress, success and failure of the project and to help them make data-driven decisions for modifications of project components and to develop future work plans as necessary. Also, data must be reported so that it can increase knowledge and make contributions to the related field for the future projects and practices to be more effective.

Thus, the M&E work plan should include an effective strategy for internal dissemination of data among the project team, as well as wider dissemination among stakeholders, donors and external audiences. The plan should also articulate what format will be used to share the findings – formal meetings with donors and stakeholders, written reports, oral presentations, program materials or community and stakeholder feedback sessions.

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Besides the traditional reporting techniques, in course of time RDF will opt for digital M&E tools and software, e.g. SPSS . These computerized/software based data entry and analysis will ensure accuracy and multiple-ways of demonstrating the findings which will allow users to visualise data into graphs, charts, reports and images for real-time reporting. These tools make reporting so much easier and help RDF to provide more clarity on their progress and ensure transparency and accountability at all levels including saving time, financial and human resources.

This Monitoring Plan will be reviewed at least on bi-annual basis and make necessary adjustments with due approval from the appropriate authority of RDF.

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