Graduate Toolkit Mastery:

Planning, Monitoring, and Project Management for Success

-Typo, PhD Student

Part 2

Planning graduate school with Monitoring and Evaluation (M&E)

Monitoring and evaluation (M&E)

Program monitoring and evaluation is a discipline

- Focus:
    - Design, implementation, and outcomes of program
- Goals:
    - Improve effectiveness
    - Ensure accountability
    - Inform decision-making

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Is M&E a real thing?

M&E courses are taught in universities in many programs including:

- Business Administration

- Information Technology and Computer Sciences

- Public Administration

- Health Administration

- Supply Chain Management, etc.

How come I have never heard of it?

M&E is often used in policy planning and implementation and government programs.

But wait...

What does program manageement have to do with my graduate experience?

"Surely I won't be managing my own graduate program."

Treat your academic objectives as a program

A program is a structured set of activities and interventions designed to achieve specific goals and outcomes.

- A program often involves:
    - A defined timeframe
    - A defined set of issues or needs
    - A community, organization, or sector

Theory of Change and Logic Models

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Theory of Change

A framework that outlines the process of achieving a long-term goal by identifying the necessary preconditions, interventions, and causal linkages.

- Long-term goal

- Preconditions

- Interventions

- Causal linkages

Example

<iframe
src="https://docs.google.com/document/d/1yi1iLUAGMyfJysEECGD5pZZ93If9tbNJ
W-aEm5prscs/edit?usp=sharing" width="100%" height="500"></iframe>

Let's create our Theory of Change

Step 1: Identify your long-term goal

"The process for developing a ToC usually starts with asking the question 'What is our long term goal or outcome?'" (Brown, 2016)

- **What is your long-term goal?**

- We are thinking in terms of social impact, not skill or knowledge acquisition.

- In a course-based program, your objectives would align with acquiring certain skills to do something. Tell us what that something is.

- In a research-based program you usually acquire and generate new knowledge to achieve some goal. What is that goal?

Let's look at three different long-term outcomes in education:

1. Modernize education policy in Quebec to make it more responsive, flexible, and conducive to continuous improvement in educational practices and outcomes.

2. Educate the general public on drug addiction and legalization policies, demonstrating how current policies work and how they can be improved using national (Canadian) and international examples (such as Portugal).

3. Integrate AI into basic education to equip students with essential AI literacy and skills needed for future job markets and technological advancements.

Let's take three minutes to write down our goals. Then we'll share them outloud.

Preparare for the following steps

"... [A] ToC is the thinking behind how a particular intervention will bring about results." (Brown, 2016)

What do I need to do during my graduate program to get from where I am now to my long-term goal?"

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Step 2:

"What conditions must be in place for us to reach the goal?" (Brown)

These necessary conditions (educating children on their rights and lobby and advocacy with policy-makers) would then be shown as outcomes on the Theory of Change pathway. (Brown)

- ""Outcomes" are the changes in individual participants in terms of behaviors, knowledge, skills, or attitudes. These can be short term or long term." (Mertens & Wilson, 2019, p. 230)

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Example of long-term outcomes:

1. **Modernize Education Policy in Quebec:**
   - 1: Establish a collaborative platform for education policymakers to share insights and propose reforms efficiently.

   - 2: Develop a streamlined process for rapid assessment and implementation of new educational programs and policies.

   - 3: Implement a robust system for continuous evaluation and feedback to ensure ongoing optimization of educational practices.

Examples of intermediate-term outcomes:

1. **Modernize Education Policy in Quebec:**
   - Build a network of stakeholders, including educators, policymakers, and researchers, to collaborate on education reform.
   - Develop and pilot test new policy frameworks and program evaluation tools in selected schools or districts.
   - Secure funding and resources to support continuous professional development and training for educators and policymakers.

Examples of early-term outcomes:

1. **Modernize Education Policy in Quebec:**

   1: Build a network of stakeholders, including educators, policymakers, and researchers, to collaborate on education reform.

   - 1: Identify and engage key stakeholders interested in education reform.
   - 2: Organize initial meetings and workshops to discuss common goals and challenges.
   - 3: Create a communication platform (e.g., mailing list, online forum) to facilitate ongoing dialogue and collaboration.

The rest you can read in the resources for this talk.

Each outcome level leads to the achievement of the next level and so on until the achievement of your long-term goal.

Outcomes establish a causal link that relates it to the whole in a logical way.

Step 3: Activities

Activities are descriptions of the processes, events, technology, and actions that are part of the program implementation. These can include:

- *Education and training services*

- *Counseling or health screening*

- *Products such as curriculum materials, training materials, or brochures*

- *Infrastructure such as new networks, organizations, or relationships*

- (Adapted from Mertens & Wilson, 2019, p. 230)

Activities lead to relevant outcomes.

Activity examples

Modernize Education Policy in Quebec

1. **Stakeholder Engagement:**
   - Organize stakeholder identification and outreach campaigns.
   - Host initial meetings and workshops to discuss common goals and challenges.
   - Create and maintain a communication platform (e.g., mailing list, online forum).

2. **Needs Assessment and Policy Development:**

- Conduct surveys and interviews to identify areas for policy improvement.

- Develop draft policy frameworks and evaluation tools.

- Pilot test these frameworks and tools in selected schools and districts.

3. **Professional Development:**

- Identify and secure potential funding sources.

- Develop detailed proposals for professional development programs.

- Implement continuous training and professional development workshops for educators and policymakers.

These activities will help implement the programs effectively, leading to the desired outcomes and contributing to the broader goals outlined in the problem statements and narratives.

Step 4: Indicators

"Ideally, every outcome/precondition should have at least one indicator to measure success or evidence." (Brown)

- Performance indicators are sometimes also called performance targets or benchmarks and they "... specify the level of outcome attainment stakeholders expect or hope for" (Mertens & Wilson, 2019, p. 388, citing WKKF, 2004).

Indicator Examples

Modernize Education Policy in Quebec:

Intermediate-term Outcome 1: Build a network of stakeholders, including educators, policymakers, and researchers, to collaborate on education reform.

- Early-term Outcome 1: Identify and engage key stakeholders interested in education reform.
  - **Performance Indicator:** Number of stakeholders engaged (target: 50 stakeholders).

Assumptions and rationales

"The Toc also has assumptions (which are beliefs about conditions that you think already exist and are not problematic to the validity of the ToC) and rationales (which explains why outcomes are needed, and why in given contexts, interventions done in certain ways are most likely to bring about the change)." (Brown)

Assumption and rationale examples

Modernize Education Policy in Quebec:

Assumptions:

- Stakeholders (educators, policymakers, researchers) are willing to collaborate and share insights.
- There is political and administrative support for education policy reform.
- Sufficient funding is available for professional development and training initiatives.

Rationale:

- **Intermediate-term Outcome 1:** A collaborative network is essential to ensure that policy reforms are informed by diverse perspectives and expertise, leading to more effective and comprehensive changes.

- **Intermediate-term Outcome 2:** Pilot testing new policy frameworks and tools allows for real-world assessment and iterative improvements, ensuring practical and scalable solutions.

Accountability ceiling

"... often represented by a dashed line drawn across the pathway that separates outcomes the organisation will monitor and claim credit for attaining, from the higher-order outcomes that are beyond its power to achieve." (Brown)

Modernize Education Policy in Quebec

- A world-class, adaptive education system in Quebec that consistently produces high-quality educational outcomes.

Public Education on Drug Addiction and Legalization

- A society with significantly reduced drug addiction rates and improved public health outcomes due to effective legalization policies.

Integrate AI into Basic Education

- Widespread adoption of AI literacy and AI-integrated learning environments across schools.

Narrative and Problem Statements

- Problem statements identify the core issues that the program aims to address and provide a clear and concise description of the problem, outlining its scope and impact.

- Narratives describe the approach and activities that will be undertaken to address the problem identified in the problem statement and outline the step-by-step process to achieve the desired outcomes.

Narrative and Problem Statement Examples

Modernize Education Policy in Quebec

Problem Statement:

The current education policy in Quebec is rigid and slow to adapt to the evolving needs of students and educators. This stagnation hampers the ability to implement innovative programs and policies that can improve educational outcomes and prepare students for a rapidly changing world.

Narrative:

In our quest to modernize education policy in Quebec, we envision a collaborative effort that engages a diverse network of stakeholders, including educators, policymakers, and researchers. By identifying and bringing together these key players, we aim to create a robust platform for dialogue and innovation. Initial meetings and workshops will help align our collective goals and identify common challenges, fostering a sense of shared purpose.

Our approach includes conducting comprehensive needs assessments to pinpoint areas for policy improvement and program evaluation. With the insights gained, we will develop and pilot new policy frameworks and evaluation tools in selected schools and districts. This iterative process allows us to refine our approaches based on real-world feedback...

Components of a ToC

1. Outcomes modelled in causal pathways

2. Activities (interventions) leading to relevant outcomes

3. Assumptions

4. Rationales

5. Indicators

6. Problem statement and Narrative

"The ToC diagram is flexible and does not have a particular format – it could include cyclical processes, feedback loops, one box could lead to multiple other boxes, different shapes could be used etc." (Brown)

The Logic Model

What is a Logic Model?

A Logic Model is a visual representation that maps out the resources, activities, outputs, and outcomes of a program to illustrate the logical sequence and connections between these components in achieving the program's goals.

Next time

I think I will leave it up to you:

- Make a logic model and discuss how to extrapolate it to our skills.

- Focus on Obsidian and GitHub

References

Mertens, D. M., & Wilson, A. T. (2019). *Program evaluation theory and practice: a comprehensive guide* (Second edition). Guilford Press.

Brown, A-M. (2016). What is this thing called theory of change? *LinkedIn*. Retrieved July 10, 2024, from https://www.linkedin.com/pulse/what-isthis-thing-called-theory-change-ann-murray-brown/

Resources

Will be sent to you later today. Please drop your emails in the chat!

Thank you!