

## POSITION PAPER

# MONITORING, EVALUATION AND LEARNING

What is monitoring and evaluation all about? How do you encourage learning in your partnership and project? How to use the learning in future projects? If you are asking yourself these questions, this paper is for you. It presents DUFs considerations on working with monitoring, evaluation and learning – as well as lessons learnt, ideas and tools for doing simple, effective and meaningful M&E.

### WHY WORK WITH MONITORING, EVALUATION AND LEARNING?

Monitoring and evaluation is a way of finding out if and to what extent you are creating the changes, you would like to see. Monitoring and evaluation is often abbreviated M&E.

#### M&E helps you to:

- **Document what you achieve** in the project and **share the knowledge**. A systematic documentation of changes helps you to be accountable to DUF and share lessons learnt with DUF and other DUF supported partnerships. You can also use your knowledge of the target group's needs and conditions or your methods' impact, when you do advocacy.

- **Check if you are on course** and **adjust** if necessary. All projects experience challenges and unforeseen events – and you will often need to adapt your project plan to new conditions.
- **Learn** from the experiences you make during the project with specific target groups, activities or methods. That way you can improve, when you do similar activities in the future and you can handover lessons learnt to new volunteers.



#### ASK YOURSELVES...

How do you find out if you are on course?  
How do you adjust your project along the way?  
How do you know if you are making a difference?

### » STORIES OF M&E

We all do monitoring and evaluation on a day-to-day basis in various ways and with differing degrees of thoroughness.

Through planning, monitoring and adjusting you are able to keep track of what you do and make the necessary adjustments – a bit like steering a car with one hand on the steering wheel, one eye on the map and one eye on the horizon.

If we are throwing a big party, we start by planning it. What would make it a good party, who will participate, what will happen at the party? At the party, we check to see if everybody is happy, if there is enough food, if the DJ is playing the right music to get the dance floor moving. Do people go home early, do they leave for other parties, does the party continue until next morning? After the party we listen to peoples stories about the party and we evaluate if the party was good or if we need to make adjustments for the next party.

- **Motivate, create ownership, and commitment** among the participants in the project. When you celebrate results and discuss lessons learnt with the participants of the project you motivate them and they gain

**WHAT IS MONITORING AND EVALUATION?**

**Monitoring** is the ongoing observation and recording of the project’s progress: Are the activities running as planned and with the expected results?

Ongoing monitoring of project activities is your best tool to verify that the project is on course – and to adjust activities or the budget if it becomes necessary.

**Evaluation** is the systematic examination of the project’s results, impact, relevance and efficiency at key stages during the project: Have you achieved the objectives of your project activities - and have you done the right things to achieve your objectives?

A well-designed evaluation can provide important learning and knowledge, which you can use to strengthen your current or future projects.

**HOW DO WORK WITH MONITORING, EVALUATION AND LEARNING?**

Monitoring and evaluation is essentially about learning – in your project and in your organizations.

» The tool: Team Self Review explains how you can use the three universal evaluation questions to reflect on your project in your team – during the project and at the end of the project.

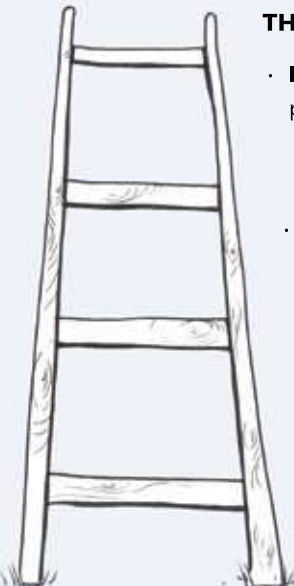
When you are monitoring and evaluating how you are doing in your project, it is useful to pose yourself the **three universal evaluation questions**:

- **Are we doing what we said we would do?**
- **Are we making any difference?**
- **Are we doing the right things?**

You can use the questions to run through the projects promised project activities and results on an overall level – and assess if you are doing the right thing to achieve your objectives.

You can also use the questions to evaluate smaller parts of the project, e.g. an activity such as a training.

Often the people who carry out the project on a daily basis will be the most knowledgeable on what has been done and with what consequences. When you reflect



**THE IMPACT LADDER**

- **Impact.** The long term changes. Often difficult to measure at the end of the project period but can be measured within 3 to 5 years after the project period. For example, individuals have used their new leadership skills to make positive changes in the local community.
- **Outcomes.** The changes that happen during a project period and are fully delivered by the end of the project. For example, participants in the training are using their new leadership skills in the partner organization.
- **Outputs / results.** The tangible things that took place as a result of the activities. For example, young volunteers who participated in the training express that they gained leadership skills.
- **Activities.** The actions made by the project. For example, a training in youth leadership.
- **Baseline.** The situation before the project. For example, only few young people have leadership skills.

on the progress of your project, it is a good idea to gather the people who implement the project and go through the three universal evaluation questions.

**At what level are you measuring change?**

You can do monitoring and evaluation at different levels of the project – ranging from that you monitor which activities have been carried out to evaluating whether you have reached your project objective.

There is often a confusion of M&E terms and the Impact Ladder helps to define terms and levels for measuring if you are making a difference.

It is easy to monitor if the project activities have been carried out according to plan – but what is really interesting is to find out if you are making a difference and if you are doing the right things.

**How to make M&E a valuable learning journey**

It is our experience, that M&E becomes most useful and inspiring, when you prioritize **learning together in your partnership** – and anchor the learning from each project in your organizations.

Learning processes and spaces are different in each organization. You need to find a good rhythm for your learning and ensure that you have sufficient time and space, where people can find a place to reflect, get support and inspiration.



**ASK YOURSELVES...**

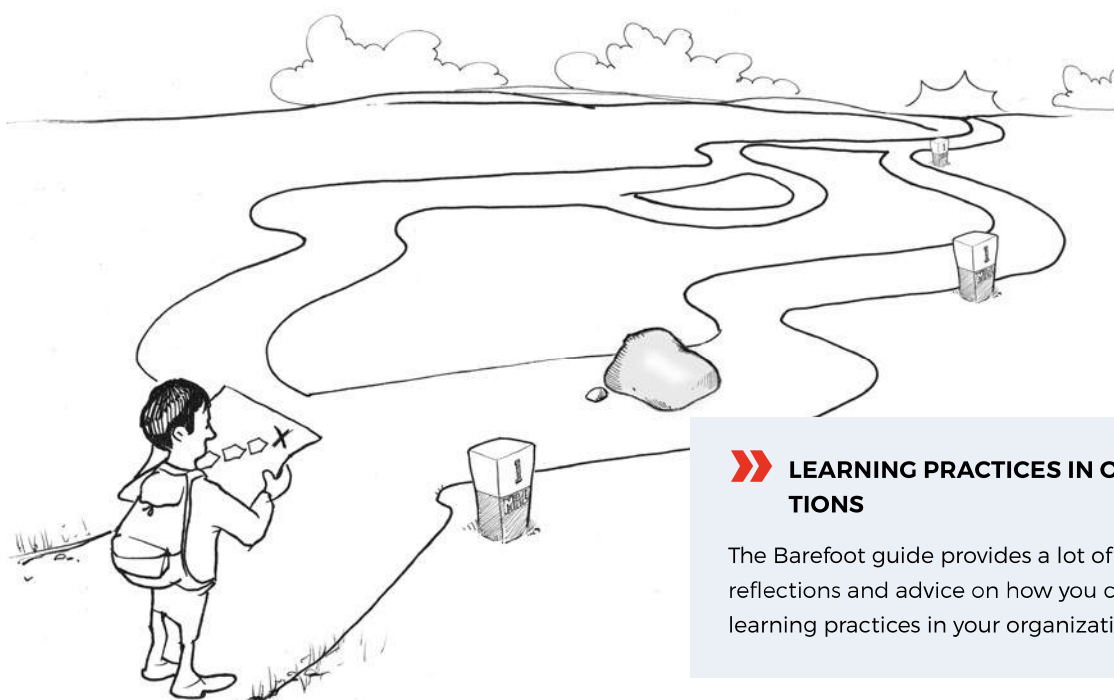
How do you share knowledge and lessons learnt in your organization? How do you pass on learnings to the next generation of volunteers?

In the **planning** phase it is a good idea to talk through the logic that underpins your project. You can think of it as a way of making a road map to change: What is the thinking that lies behind your planning? How do you think social change happens? What causes people to think, feel or behave differently?

Depending on your project, it can be a good idea to involve the people who will participate in the project in talking about what change they would like to see and how progress can be seen along the way.

**During the project** – Once the project is running it is important to take reflection time. It is like being on a journey, where you sometimes stop at resting places and take the opportunity to look back, reflect on the trip so far and review progress.

When you do M&E at key points during your project, you can make use of the learning to improve your project activities along the way.



**» LEARNING PRACTICES IN ORGANIZATIONS**

The Barefoot guide provides a lot of good stories, reflections and advice on how you can strengthen learning practices in your organizations.

If you regularly check if you are on course and adjust the project along the way, you will have a better chance of achieving your objectives.

It is a good idea to have regular meetings for the team that works with the project on a daily basis, for instance weekly or monthly meetings, where you coordinate, share knowledge, get support for challenges and learn together.

It is also a good idea to put aside time for longer review meetings and workshops at key points during the project period, for instance at the start of the project, after key activities, midway and at the end of the project. That gives you time to go through the project achievements as well as share experiences, get ideas and advice for how to adjust the project activities.

**At the end of the project** – When you finish the project you have come to the end of the journey – until the next project starts. At this point, look back at what you did, reflect on if it made a difference and if you did the right thing.

In youth organizations, there is often a big turnover of volunteers and staff. It is therefore important to document the learnings and share them with new volunteers so that the experiences can be used, when a new project is planned.

**METHODS FOR M&E**

There is a wide range of approaches and tools you can use for your M&E. Here are some suggestions from DUF.

The Logical Framework Approach is useful as a tool for mapping out the logic of your project and planning your activities. It is also a valuable tool for monitoring progress and change along the way. You can measure progress on the project objectives against the success criteria and decide on means for verifying the changes. Use the LFA as a dynamic planning tool, that must also be adjusted when the context changes or when you encounter challenges to the original plan.

**Team Self Review** uses the experiences of the people that work with the implementation of the project on a daily basis. This method can be used for reflecting on the project along the way as well as for final evaluations.

**»» Your plan for monitoring and evaluation** is a tool to manage, learn from and adjust your project along the way. DUF recommends you to include M&E activities in your project plan – and budget for expenses such as transport and food for an evaluation meeting.

**»» PRINCIPLES FOR GOOD M&E**

Meaningful M&E is about how you think and what you do. Good tools can help you – but essentially it is about creating everyday practices of learning in your organization.

- **Ownership.** Make your M&E meaningful to you and to the persons who participate in the project. Meaningful M&E starts when you create a project – make sure the project objectives make sense to the participants and involve them to see if you are making progress.
- **Use it or lose it.** M&E is essentially about learning if you are making progress and if you are doing the right thing. Make sure to share lessons learnt in your partnership, use it for adjusting the project and anchor the learning in your organization so you can use it for the future.
- **Integral to the project.** Think about how you will monitor, evaluate and learn from your experiences – from the start of the project.
- **Fit for purpose.** Interviews are good for in depth understanding of individual experiences – surveys can provide an overview of opinions, behaviors, needs among a group of people. Use methods that best help you get the information you want.

## » REPORTS TO DUF

At the end of your project, you must explain to DUF to what extent you have achieved your project objectives – and what you have learned along the way. DUF would like to learn from the successes and challenges you have faced and the lessons you have learnt. That way, we can better advise other international partnerships. Projects don't always go according to plan – and it is not expected that you did everything you said you would do in the exact way you planned it. What is more important is that you are committed to getting better at making a difference, learning from your experience and sharing the lessons learnt with others.

## » WHO DO YOU DO M&E FOR?

When you receive a project grant from DUF, you must evaluate the project at the end and be able to demonstrate to what extent your project has made a difference. However, it is equally important that you do M&E in a way that is meaningful and useful for you – so that you learn from your successes and challenges and use this learning.

**Most Significant Change Stories** and **Impact Grid** is about collecting and analyzing participants' stories to understand the changes that have happened due to a project. The stories give examples of the knowledge, skills or confidence participants have gained and how they use it in their lives.

The method is well suited for catching both expected and unexpected outcomes of a project – and can deliver a rich picture of what has happened.

## » LEARN FROM YOUR REPORT

Here are some ideas that make reporting a better learning experience:

- Move from a focus on the activities (by your organizations) to a focus on what changes people experience in their lives. Don't only look at what happened, but also at what made the changes possible.
- Focus on what went well and what needs to improve. Include challenges, lessons learned and recommendations.
- Look into both expected and unexpected results

**The Kirkpatrick model** helps you to assess learning outcomes of training and education processes. It highlights the importance of follow up to participants so that they apply learning back in their organizations.

» This paper presents DUF's considerations on monitoring, evaluation and learning – as well as ideas and tools for working with your partnership.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organizations and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to how you should work with M&E and learning. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUF's learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

**Interviews** are useful for getting in-depth knowledge and context understanding from stakeholders in a project.

**Surveys and questionnaires** are useful for getting responses in a uniform way from a large group of people or a statistically representative group of respondents.

**Focus group discussions** gather a group of people to get their views on key issues and can be useful, when deciding how to work with a specific issue.

**Case studies** are useful for evaluations. They focus on an aspect of a project and describe how the project has affected a given group of people. You can use participatory methods to get a target group to give their experience of the changes that have happened due to a project.

**Time Lines** are useful for recording and talking about the history of a project or a partnership. It is a good tool for identifying key events or critical decision points and the effects of events on a project and its participants.

**Participatory evaluation** methods involve project participants in designing an evaluation process, collecting data and assessing the changes created by the project. This can help enhance learning and create ownership of the project outcomes among participants.

**DUF has created the following toolkit papers:**

- Tool: Team Self Review
- Tool: Most Significant Change
- Tool: Impact Grid
- Tool: The Kirk Patrick Model for Organizational Learning
- Tool: Planning for M&E in your project
- Tool: M&E based on the logical Framework Approach
- Tool: Timelines

**FURTHER INSPIRATION...**

**Meet up with DUFs consultants**

DUF can provide inspiration on how to strengthen learning in your organizations, supply more tools and give advice on the monitoring and evaluation work in your projects.

**RECOMMENDED TOOL KITS AND LITERATURE**

- Rick James, **Most Significant Change**
- **The Barefoot guide to learning practices in organizations and social change**