

Handout 14

STAGE TWO: SOME M&E TOOLS

This table includes some commonly used M&E tools that are likely to be relevant for the kind of work undertaken by CBM and its partners. It is important to remember that there are many tools that are available to collect information – this is just a small sample.

When selecting the tools for your M&E task, you need to make decisions about:

- ▶ **Objectives:** What are the reasons for involving participants in the provision of information and what are the expected outcomes in terms of the use of that information? Do you need to involve many people or a few?
- ▶ **Topic:** What is the nature and scope of the issue being addressed? Is the tool relevant to the project that is being assessed? Will the tool generate the kind of information that is most relevant?
- ▶ **Participants:** Who is affected, interested or can contribute to understanding about the changes related to this work? Are we able to reach these people and how best can we do so?
- ▶ **Time:** How much time is available? Have we allowed for the time needed to travel between places?
- ▶ **Budget:** What resources are available, including staff and travel time, to collect, analyse, write-up and report on findings

Tool	Description
CBM Inclusion Indicators – data collection approach and accompanying tools	This note guides the reader to get familiar with a data collection approach and accompanying tools in order to engage in conversations and interviews about a set of qualitative themes around Disability Inclusion in development work. For easier reference we named these themes = indicators, or the CBM Inclusion Indicators.
Analysis of secondary sources	A review of documents (secondary data) such as project records and reports, administrative databases.
Case study	A detailed descriptive narrative of individuals, communities, organizations, events, program, or time periods. Case studies are particularly useful in evaluating complex situations and exploring qualitative impact.
Checklist	A list of items used for validating or inspecting that procedures/steps have been followed, or the presence of examined behaviors.

Tool	Description
Closed-ended (structured) interview	A technique for interviewing that uses carefully organized questions that only allow a limited range of answers, such as “yes/no,” or expressed by a rating/number on a scale. Replies can easily be numerically coded for statistical analysis.
Community interviews/meeting	A form of public meeting open to all community members. Interaction is between the participants and the interviewer, who presides over the meeting and asks questions following a prepared interview guide.
Direct observation	A record of what observers see and hear at a specified site, using a detailed observation form. Observation may be of physical surroundings, activities, or processes. Observation is a good technique for collecting data on behavior patterns and physical conditions.
External expert assessment	Judgment by external specialists (usually in a team) about what has occurred in a specific setting. They may use one or more of the tools listed in this table as the basis for making their judgment.
Focus Group Discussion	Focused discussion with a small group (usually 8 to 12 people) of participants to record attitudes, perceptions, and beliefs pertinent to the issues being examined. A moderator introduces the topic and uses a prepared interview guide to lead the discussion and elicit discussion, opinions, and reactions.
Key informant interview	An interview with a person having special information about a particular topic. These interviews are generally conducted in an open-ended or semi-structured fashion.
Most Significant change (MSC) technique	MSC is a participatory means of “monitoring without indicators” as well as a contributor to evaluation. It involves many project stakeholders in a process of deciding the sorts of changes to be recorded, collecting stories from the field level and analysing the data collected. It contributes to evaluation because it provides data on impact and outcomes that can be used to help assess the performance of the program as a whole.

Tool	Description
Open-ended (semi-structured) interview	A technique for questioning that allows the interviewer to probe and follow up topics of interest in depth (rather than just “yes/no” questions).
Participant observation	A technique first used by anthropologists; it requires the researcher to spend considerable time with the group being studied (days) and to interact with them as a participant in their community. This method gathers insights that might otherwise be overlooked, but is time-consuming.
Participatory processes	Participatory processes are useful when there are groups of people involved in M&E work and their answers to questions and views are likely to vary. Some processes promote diversity and others seek to find shared points of view. Examples include: World Café, 21st century town meetings, Charrette, Citizens Jury, Consensus conference, Deliberative polling, Delphi.
Participatory rapid (or rural) appraisal (PRA)	This uses community engagement techniques to understand community views on a particular issue. It is usually done quickly and intensively – over a 2 to 3-week period. Methods include interviews, focus groups, and community mapping.
Questionnaire	A data collection instrument containing a set of questions organized in a systematic way, as well as a set of instructions to the enumerator/interviewer about how to ask the questions (typically used in a survey).
Self-administered survey	Written surveys completed by the respondent, either in a group setting or in a separate location. Respondents must be literate (for example, it can be used to survey teacher opinions).
Statistical data review	A review of population censuses, research studies, and other sources of statistical data.

Tool	Description
Survey	<p>Systematic collection of information from a defined population, usually by means of interviews or questionnaires administered to a sample of units in the population (e.g., person, beneficiaries, and adults). A mini-survey, would collect data from interviews with 25 to 50 individuals, usually selected using non-probability sampling techniques. Structured questionnaires with a limited number of closed-ended questions are used to generate quantitative data that can be collected and analyzed quickly. Larger surveys can cover up to hundreds of individuals.</p>
Visual techniques	<p>Participants develop maps, diagrams, calendars, timelines, and other visual displays to examine the study topics. Participants can be prompted to construct visual responses to questions posed by the interviewers, for example, by constructing a map of their local area. This technique is especially effective where verbal methods can be problematic due to low literate or mixed language target populations, or in situations where the desired information is not easily expressed in either words or numbers.</p>
Weighted checklist	<p>Weighted checklist is a participatory way of rating and weighing the importance of changes. It involves developing a list of items, each of which describes an attribute of an organisation or an event. The attribute may or may not be present (indicated by a 1 or 0), or it may be present in a degree measured in a simple scale (e.g. 0 to 3). Then a set of weights, which describes the relative importance of each item is developed. Then a summary score, is worked out, based on the number of items identified as present, but adjusted by their individual weights.</p>

Resources on M&E

There are very many resources available to help you with M&E work. Some include:

American Red Cross, Monitoring and Evaluation Planning

http://www.crsprogramquality.org/storage/pubs/me/MEmodule_planning.pdf

CBM Inclusion Indicators, CBM International Office 2012, write to the following address for more information: MEL@cbm.org

CBMs Guidance Note on *Data collection methodology for partner organisations, ROs and COs for the use of CBM Inclusion Indicators*, CBM International Office 2012. Write to the following address for more information: MEL@cbm.org

Davies, Rick, Monitoring and Evaluation News <http://mande.co.uk/>

MEASURE (Measure and Evaluation to Assess and Use Results Evaluation). 2008.

<http://www.cpc.unc.edu/measure>

Participatory Planning Monitoring & Evaluation (PPM&E) Resource Portal. 2008.

<http://portals.wdi.wur.nl/ppme/index.php?Home>.

Performance Assessment Resource Centre (PARC). 2008. <http://www.parcinfo.org/>

Resources for Methods in Evaluation and Social Research. 2008.

<http://gsociology.icaap.org/methods/>

Slokum, Nikki, 2003, *Participatory Methods Toolkit: A practitioner's manual*, United Nations University http://archive.unu.edu/hq/library/Collection/PDF_files/CRIS/PMT.pdf

United Nations Development Program (UNDP). 2008. <http://www.undp.org/eo/>

United Nations Evaluation Group (UNEG). 2008. <http://www.uneval.org/>

United Nations Population Fund (UNFPA). 2000. *The Program Manager's Planning, Monitoring and Evaluation Toolkit: Planning and Managing an Evaluation*.

<http://www.unfpa.org/monitoring/toolkit.htm>

USAID (United States Agency for International Development). 2002. *Developing a Participatory Monitoring and Evaluation Plan*. www.synergyaids.com/.

World Bank, Independent Evaluation Group (IEG). 2008. *International Program for Development Evaluation Training*. <http://www.worldbank.org/oed/ipdet/modules.html>.