TOOLBOX: Monitoring & Evaluation Methods for Trainings

DRAFT

(PLEASE DO NOT CIRCULATE)

Contents

Part 1: Overview of Monitoring & Evaluation

Introduction

Advocates for International Development's (A4ID) Rule of Law Expertise UK Programme (ROLE UK) has produced this toolbox to be used in conjunction with the ROLE UK training workshop, 'Monitoring & Evaluation Methods for Trainings'. It is intended to support those delivering pro bono legal technical assistance, in the form of trainings, as part of international development work. Building upon ROLE UK's 'Monitoring & Evaluation Toolbox', which provides pro bono stakeholders with practical tools that can be used when designing, monitoring and evaluating projects, this resource serves to support the planning and delivery of a monitoring & evaluation (M&E) strategy that is specific to delivering training activities, as part of a broader M&E strategy.

The toolbox addresses each stage of enacting an M&E strategy for trainings: planning and preparation, data collection and analysis, and, lastly, the use of findings for adapting programming. It will explore how to make appropriate decisions about the possible approaches to M&E to produce relevant evaluative insights about a training activity in the most effective and time and resource efficient way.

Who is this guide for?

The toolbox is targeted at legal and judicial specialists undertaking – or seeking to undertake – international legal technical assistance.

In particular, the toolbox will be of most relevance to professionals in the legal sector (e.g. lawyers, judges, academics) who, through their own organisations or pro bono networks, are trying to address a specific rule of law issue in a particular country, over time, and are able to spend some time planning, delivering and monitoring 'in-country', rather than doing solely desk-based pro bono work.

More specifically, pro bono stakeholders applying for ROLE UK partnership or assignment support to facilitate their pro bono work overseas will find the toolbox helpful when designing their legal assistance project and completing the application forms.

Why is monitoring & evaluation important?

The aim of delivering event specific activities such as a training, is to effect change in individuals, who, in turn, will effect change towards a wider goal, or impact, such as improving the rule of law. Once a training has been delivered, it is important that you are aware of, and assured that, the training has produced the results you expected both in the behavior of your participants, or the wider impact upon the rule of law that can be attributed to the training. You may also want to be assured of the quality of the training, and that the resources and efforts used were efficient and effective.

M&E refers to the methods and approaches of data collection and analysis to evidence and understand the value of your work, and the processes of change brought about by the training. The results of an effective M&E strategy will provide robust evidence of project achievements and help you to make informed decisions about how your training has brought change, and to adapt and improve the effectiveness of related future projects.

Principles of M&E

M&E approaches require that you collect and record information about your training, referred to as data. Your data will provide you with only a partial picture of reality, but with the right data we can still capture and piece together an accurate enough picture to make judgements about what is happening, or has happened, as a result of your training. Good M&E is dependent on collecting good data and should adhere to the following principles:

> **Relevant**: Your M&E data needs to be relevant, in that it is about things that you need to know to make an informative evaluation of your training. This is one of the most important aspects of ensuring that your M&E strategy is effective, and therefore we will address this principle in detail below.

Reliable and Valid: You need to ensure that there are good grounds to believe that the data you are collecting is accurate and is, so far is possible, not partial or biased. To achieve reliability and validity it is recommended that you collected data from a variety of sources and have a good-sized sample of responses if it is from a group, so that the data can be compared across different perspectives. Where similarities exist, it is the corroboration of the data that will provide you with confidence in your conclusions.

Inclusive and Ethical: You need to ensure that your data collection methods take into account any inequalities that may exist within the groups that you are collecting data from. Efforts must be made to ensure that all voices are heard, to ensure that your results reflect everyone's different experiences of the training. You also need to consider the ethics of your data collection methods and how the results will be used. Data collection should be done with consent and with a right to refuse, participants should be made aware of how the data will be used, and where possible our sources should be made anonymous.

Proportionate and Efficient: An M&E strategy should only entail activities that are reasonable to undertake in a given situation and are proportionate to the scale of the training activity. This means that the M&E tasks will not be overly burdensome for the facilitators or the people from whom you are collecting data. Where possible these activities should be built into the training activities ensuring you harness easy opportunities for data collection.

Replicable: Where it is possible, it is better to create tools and resources for data collection which may be used again in the future for another training. By using the same or adapted tools, it means that the results of our M&E may be directly compared across different training activities. Such comparisons can be very useful for evidencing progress over time, or to identify and address any shortcomings of the activity.

Planning an M&E Strategy

You should be considering and integrating M&E at every stage of project development and delivery, and therefore the M&E strategy planning ought to be undertaken alongside your general activity planning. Your strategy will ensure that you have integrated all the above principles. It will provide a clear roadmap for the delivery of the M&E data collection, ready for your analysis and integration of results.

How do we ensure our M&E Strategy is relevant?

Consideration of the three **Universal Questions for Monitoring & Evaluation** will help you to establish what is relevant to monitor and evaluate. Under each question you can consider a list of **focused questions** about your specific training activity. Your focused questions will directly inform you the kinds of data you need to collect and from this, the tools and approaches that are appropriate to employ to do this.

Three Universal Questions of Monitoring & Evaluation

Q.1) Did we do what we said we would do? (Did we deliver the training as we had planned?)

This question concerns considering the resources (money, time, expertise) we planned to put into the training, and the expected **outputs**, which were laid out in your *activity plan*.

Outputs are quantifiable aspects or products that are intended to be produced by the training happening; e.g. the training itself, or the number of participants who have experienced the training (attended), or a product such as establishing a code of conduct with participants.

The question also considers the *quality* of the outputs – e.g. the participant's satisfaction with the training or the participant's increased confidence about the subject of the training.

This question also prompts us to reflect on why or why things happened, e.g. what worked well to ensure there was a balance of genders in the participants, which was an aim of the training. Data to answer these questions can which can inform how you can support this sought-after output in the future.

Q.2) Are we creating the change we intended to make?

This question concerns the expected **outcomes** of the training, whether the training has had an effect upon the behaviour of the participants in their lives after the training in the way that we intended. i.e. did the participants use the capacities that they learned in the training in their work regularly and effectively? This expected change will be laid down in your *Theory of Change*.

The COM-B model (see box below) of behavior can help us to unpack behaviour change and consider the process of how and why the training may have brought this about.

Q.3) Are these the right things to do?

This question concerns investigating whether your training has had an effect on the **impact(s)** which you sought through the training, or the wider project which the training is a part of and the process by which this did or did not happen.

This requires considering the assumptions embedded in your *Theory of Change,* that you have made about the process by which the impact would be achieved from the training.

From this you can answer whether the training was the right or a good approach towards achieving the impact, or consider what are the factors that might be hindering this, to be able to adapt future project activities accordingly.


Activity Plan and Theory of Change

These questions require consideration of a training activity plan and the theory of change that concern your training activity.

A training activity plan provides practical details of how and what is going to be delivered. This should include:
- The required resources – including financial, personnel and materials
- The people who are expected to attend the training
- Event logistics and other practical details
- Learning methods and objectives
- Any products expected to come out of the training

A Theory of Change is essentially a comprehensive description and illustration of how and why desired changes at outcome and impact level are expected to happen in a particular context. This is supported by various assumptions that have been made about the process by which change is expected to occur.

If you deliver the training
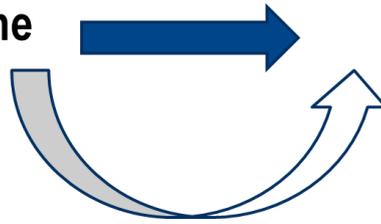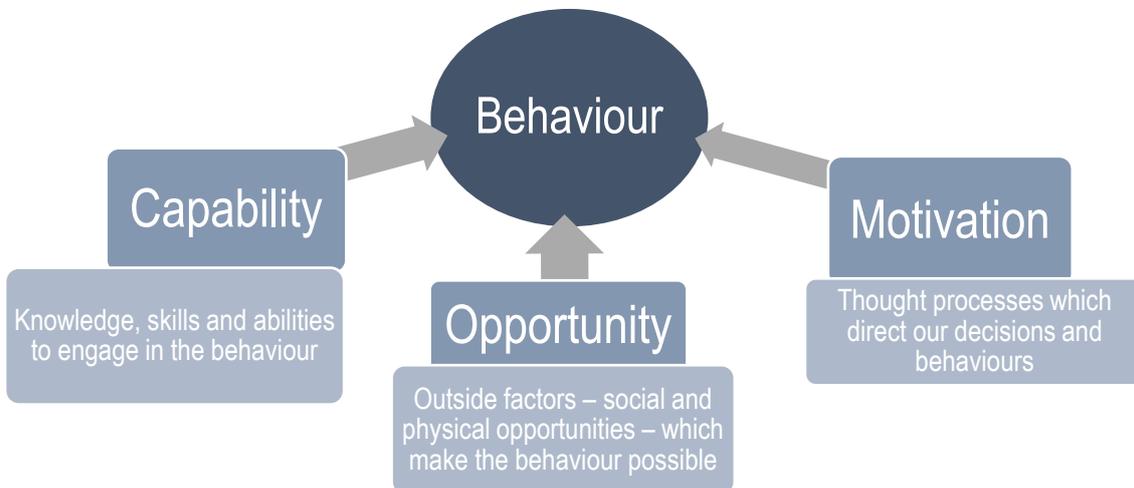
Then you will see progress towards…

This is because of…

The logic and assumption as to **why and how** the change will happen.

COM-B Model of Behaviour

The COM-B Model is useful to consider the factors that drive human behaviours and therefore how to design trainings to drive the particular intended changes in behavior that concern the intended **outcomes** and **impacts** sought through your training.

The model can assist us to establish relevant **focused questions** to explore concerning the Universal Questions 2 and 3. You will need to determine what aspects of the COM-B model are relevant to your training, i.e. through your training are you expecting to affect relevant changes in your participant's capacities, opportunities and motivations?

Behaviour

Capability
Knowledge, skills and abilities to engage in the behaviour

Opportunity
Outside factors – social and physical opportunities – which make the behaviour possible

Motivation
Thought processes which direct our decisions and behaviours

M&E Focused Question box

A good approach to ensuring that your M&E strategy is relevant is to you make a list of all the **focused questions** about your training that flow from considering each of the Universal M&E Questions.

Once you have established the question you would like to answer, it is useful to decide upon a target for success – based on what you would like to aim for the outcome to be. These may be quantitative or qualitative but they do need to be measurable.

Q.1: Are we doing what we said we would do?	Targets for success
The use of resources put into the training and the outputs The quality of these? Why?	
Q.2 Are we creating the difference/change we intended to make?	Targets for success
Immediate effects (outcomes) i.e. the participants' change in behaviours and changes in capabilities, motivations, opportunities that support this.	
Q.3 Are we doing the right thing?	Targets for success
Longer-term effects (impacts of the project) Did our assumptions hold true? Is the training the right thing to be doing to achieve the impact?	

Part 2: Data Collection Methods

Measuring Outputs and Outcomes
Are we doing what we said we would? Are we making any difference?

For a good M&E strategy, it is advisable to use a range of data collection methods to increase reliability and also measure different aspects of the training.

Attendance Sheets
It is important to have attendance sheets to have evidence of how many people participated and who these people were. For online trainings, you will need to ask people to sign in with their name in order to make a record of who attended.

In conjunction with a system to collect this data, it is important to keep a well-managed (and secure) database of participants with their contact details. This will help you to keep track of which participants have been to which events and those who it might be most useful to follow-up with. It also helps to show how a particular group of people are staying engaged with the programme and their capacities being built over time, as opposed to if different people are attending different trainings. If the latter occurs, we then might want to ask why that is and if that is something we want.

Confidentiality
Of course, there may be situations in which participants are not happy to sign in or provide such details. For example, if the training is on a politically or socially sensitive topic, or providing such details may be sensitive in itself, such as for undocumented refugees and migrants. It is worth always ensuring participants (and assuring) that data will be kept securely and not shared with anyone other than your organisation and partner and donor organisations, and to not insist that participants do so.

Feedback Surveys
These are the most commonly used tool as it is easy to administer a short survey at the end of a training. But there are many factors to consider that can affect the quality of data you collect through a survey.

Advantages	Disadvantages
- Can collect demographics - Can collect data at both output and outcome level - Can collect quantitative and qualitative data - Produce comparable findings - Quick to administer	Subjective

Measuring behaviour change
Feedback surveys can gather information on a range of topics. While feedback surveys are often used to gain quick and simple feedback on participant satisfaction with the training, they can also be used to gain insight into aspects of behavior change: capabilities, opportunity and motivation.
A feedback survey could help to answer the following questions:

- Do the participants feel that they have acquired new skills and knowledge? In which areas? (Capabilities)

- Do participants feel motivated to change their approach? (Motivation)

- What further support do participants need in order to apply their new capabilities? (Opportunities)

- Can participants identify ways in which they plan to apply these new skills and knowledge? (Behaviour change)

Collecting quantitative and qualitative data

Feedback surveys ought to collect both quantitative and qualitative data. Quantitative data is collected through close-ended questions answered on a scale or yes/no, while qualitative data is collected through open-ended questions. Quantitative data is easier for conducting statistical analysis and quick comparisons of results (as everyone is responding using the same measure and interpretation of the data is less subjective), as well as for creating graphic representations of data. Qualitative data, meanwhile, can provide more informative answers, if questions are phrased correctly.

If the survey is purely qualitative, with people answering open-ended questions, it will be harder to analyse the data afterwards as the participants may not answer in the same way and the evaluator will have to interpret their answer. It also takes a lot longer for people to answer a lot of this type of question. However, if all questions yield quantitative data (where people answer on a scale or closed questions), the information we get is less likely to be as insightful.

It is good practice to follow a quantitative question with a qualitative question to better determine the reasons behind the response. For instance, we might know that 60% of participants reported that they gained new ideas from the training, but which ideas were these? This could be as simple as putting a 'please explain your response' afterwards, though this often doesn't illicit thought-out answers or is skipped, and so it can be useful to make the question more specific to encourage a response. For example: "If so, what was the most interesting thing you learnt?"

Tip: Reducing subjectivity

The main disadvantage of feedback surveys is that they are subjective, since answers are still based on the participants' own perception of the training. One way to reduce subjectivity is by asking for examples. For instance, "Do you feel able to apply the knowledge/skills gained from the workshop?" could be followed by "Can you give an example of a scenario in which you will be able to apply this new knowledge/skills?" or "How will you apply the knowledge/skills you have gained from the training in your work?"

It also helps to be as specific as possible. For instance, "How satisfied were you with the training?" vs. "How well did the trainers communicate information?" and "Did you feel the presentation was engaging?" This might mean that you have to break one general question down into a few more specific questions but it will give you a lot more useful information and doesn't take much more time to answer if they are asked in the same format, e.g. 4 questions answered on the same scale.

Feedback Survey Checklist

Will the questions collect all the information you need?

Are the questions and answer options clear and relevant?

Are the answer options appropriate to the questions and do they enable participants to express themselves sufficiently?

If scales are used, are they consistent, e.g. a 5-point scale is used throughout?

Do participants have options to give more information?

Are any questions repetitive?

Does it take more than 5 minutes to complete?

Is the survey anonymous, while still asking for useful demographic information?

Example Training Feedback Survey Questions

The following are generic questions for training feedback surveys that can be adapted for your purposes.

1. How satisfied were you that the workshop: (1 being very dissatisfied and 5 being satisfied)

▪ was engaging?	1	2	3	4	5
▪ provided you with new information?	1	2	3	4	5
▪ clearly communicated information?	1	2	3	4	5
▪ went into enough detail?	1	2	3	4	5

b) Which part of the workshop did you find the most interesting or useful and why?

c) Which part of the workshop did you find the least interesting or useful and why?

d) How do you believe the workshop could be improved: (please select all that apply)

- ▪ Better facilitation
- ▪ More time for participants to discuss concepts
- ▪ More time for participants to practise methods
- ▪ The workshop cannot be improved
- ▪ Other, please specify _____

> Q1 – Did we do what we said we would do
>
> Measuring quality of activities
>
> Q2 - Are we making any difference?
>
> Measuring knowledge transfer

2. To what extent do you feel that the training increased your knowledge of the following: (1 being not at all and 5 being to a great extent)

▪ *Topic 1*	1	2	3	4	5
▪ *Topic 2*	1	2	3	4	5
▪ *Topic 3*	1	2	3	4	5

> Q2 – Are we making any difference?
>
> Measuring knowledge transfer
>
> (in place of pre- and post-tests)

3. How likely are you to apply what you have learnt from this training to your work?
(1 being very unlikely and 5 being likely)

          1   2   3   4   5

b. Can you give an example of how you might apply what you have learnt from this training to your work?

c. Is there anything that might prevent you from applying what you have learnt?
(select all that apply)

- Nothing will prevent me from applying what I have learnt
- Still lack sufficient knowledge on *the subject*
- Need more time to practise new skills
- Lack of confidence
- I don't think it is an important topic
- The training was not applicable to my line of work
- Other, please specify _____

> Q2 – Are we making any difference?
>
> Measuring behaviour change, esp. opportunities and motivation to apply knowledge

---

And don't forget to collect demographics…

Feedback surveys and pre/post training tests can be anonymous but still record demographic information, such as gender, region, institution, religion, profession, etc.. Such data helps us to better analyse the type of people who are attending and monitor diversity.

As well as being useful for monitoring equal opportunities in who we are reaching through our trainings, gathering participant data is very useful once it comes to analysing our data. It allows us to pull apart a statistic and understand who is answering in a certain way, which then may help us to understand the barriers facing certain groups and what we can do to address this.

Pre- and Post-Training Tests

Advantages	Disadvantages
- more objectively measure change - measure change in capabilities and motivation - measure whether training is the right level for the participants - identify knowledge gaps - measure changes in participants' views	- can be laborious - are still subjective, especially if the questions are self-reflective - do not explain WHY knowledge or confidence did/did not increase - do not explain which aspects of the training worked best

• make the training more interactive • integrate feedback into the training to increase response rate	• do not indicate whether participants will use the knowledge they have gained • some senior professionals may not appreciate being 'tested'

Pre- and post-training tests can provide a more reliable measure of knowledge gain and other changes that have resulted from the training, such as confidence.

There are two ways to design such tests. The first is a self-assessment, asking participants to report on their perceptions of their knowledge and abilities. This is still subjective but enables you to better measure change.

The second is more like an actual test (usually multiple choice) where you ask a set of questions that test participants on the knowledge they should gain over the course of the training. The same questions are then asked again at the end of the training. Ideally, if the training is set at the right level for the participants, they won't know the answers at the start and will at the end. This therefore provides a more reliable measure of knowledge and confidence gain. It also helps you see where there are clear knowledge gaps. For instance, if all participants are still getting a particular question wrong, it suggests that the training is not adequately covering that topic.

Example knowledge test question:

Pre- and post-training tests can<u>not</u>:

a. Help identify gaps in participants' knowledge
b. Make the training more interactive
c. Help explain which training methods worked best
d. Measure change in capabilities and motivation
e. Not sure

Example self-assessment confidence question:

On a scale of 1-5, 1 being extremely confident and 5 being not at all confident), please rate how confident you feel on the following matters:

a. The 3 Universal Questions for M&E and how these relate to evaluating trainings

    1   2   3   4   5

b. The purpose of different M&E tools for evaluating trainings

    1   2   3   4   5

c. Designing feedback surveys to gain high quality data for assessing the effectiveness of trainings

    1   2   3   4   5

Designing these tests is also a useful way to review the training by working out what specific knowledge you want to communicate to participants and if the training you've designed likely to do so.

Testing data collection methods

Remember to leave time to have someone check feedback surveys and pre- and post-training tests before you use them in the training to help make sure that questions are clear and easy to answer.

For pre- and post-training tests, it also helps to make sure that answers can't be easily guessed and are set at the right level.

Observations

Advantages	Disadvantages
• Intuitive • Undemanding	• Less objective • Harder to compare findings • Do not tell you *why*

Observations are a useful tool since they don't ask anything of participants and we intuitively do this.

We all naturally observe things that go on around us and make judgements. But to conduct observations for M&E purposes, we need to shift our natural observations up a gear to become more analytical.

A useful tool to have to help us in this regard is an observation template. This can prompt us to notice certain aspects of the training that we otherwise might not.

It is good practice, when taking notes, to include anecdotal evidence explaining why you have come to certain conclusions. For instance, such as supporting an observation that participants were not engaged by explaining that no-one answered the trainer's questions, or an observation that participants' knowledge increased by explaining that participants asked relevant questions that the trainer was able to answer.

However, though it is possible to improve the reliability of any observations made, it is still hard to identify the reasons behind the observations you make. While observations are good for providing a general impression of how a training went, they are therefore not a method for gaining robust data and should be used in conjunction with other data collection methods.

Training Observation Template

Question	Yes/No	Notes (details, evidence)
DID THE TRAINER…		
State the purpose of the training and learning outcomes clearly?		
Explain how the training is relevant to participants' job/role?		
Check participants' current knowledge/experience?		
Follow the training plan?		
Explain information clearly and in detail?		
Give participants enough opportunities to ask questions?		
Encourage *all* participants to engage in learning?		

DID THE TRAINING…		
Cover all the important points?		
Include activities to reinforce new knowledge?		
Provide the opportunity to practise new skills?		
WERE PARTICIPANTS…	*N.B. Make note of any differences observed between the behaviour of different groups of participants, such as by gender or profession*	
Engaged in discussions?		
Asking questions that suggested the training was set at the right level?		
Providing answers to questions that demonstrated learning?		
Enthusiastic about what they were learning?		
LOGISTICS		
Was the venue appropriate?		
Was the timing appropriate? (did the training run on time? was enough time provided for participants to arrive? were there enough breaks?)		
Were all the necessary training resources available?		

What aspects of the training session were most effective, and why?

_____

_____

_____

Did you notice any way that the training could be improved?

_____

_____

_____

> Remember:
>
> Having a seat at the table doesn't mean having a voice. Equality monitoring is as much about observing equal interactions as it is about recording attendance.

Measuring Impact
Are these the right things to do?

When we talk about impact, we mean the long-term effects of the training in reaching your end goal – for example, the change at rule of law level and subsequent improvements to people's lives.

It can be difficult to measure impact when working on rule of law and other development issues as the change we want to see usually takes several years to be realised and will be the result of several factors, not only this one training, or the work of your organisation alone. Therefore, in most cases it will not be possible to determine a simple X directly led to Z scenario.

However, there are still ways for you to see if your work is contributing to change, and working on rule of law issues actually simplifies this somewhat as there are often clear goals to measure, such as if case outcomes improved or legal reforms were achieved.

Part of a Broader M&E Strategy

Methods for measuring impact are not only for measuring the impact of trainings but for measuring the impact of the combination of activities that form your project/programme and how the training contributed to achieving end goals. They should help you to assess if your programme strategy is working - testing the assumptions in your theory of change and identifying any unexpected effects of activities.

Following up with participants and other stakeholders

The simplest way we can know if participants are acting on their behaviour change and the training is having an impact is by following what the participants go on to do. This may be through a follow-up survey or interview sent several months after the training – leaving enough time for changes to have occurred but not long enough for participants to have forgotten what the training was about.

Questions may not be focused only on a specific training but be about a range of activities that participants have been involved in, and speaking to them a number of months later will help you to see how these different elements of your workplan are contributing to improving their skills.

This is the point at which it really helps to have that database of participants as well as having strong relationships with the people you are training and other stakeholders you are working with.

The advantage of an interview (or catch-up call) over a survey is that you can ask follow-up questions based on what the participants tell you has happened. However, if you have a large number of participants, it's advisable to send a survey round and follow-up with those that yield interesting results if you think it would be valuable to get more information.

Examples of questions you might want to structure your surveys and interviews around include:

- Have they remembered the information delivered in the training? Do they need additional resources?

- Since the training, has the participant had a chance to use the knowledge they gained? If so, what were the details of the outcomes? (the more information here, the better)

- Have they encountered any obstacles or challenges in doing so? What could help to address this?

- Do they now feel that there is anything important that was missed out of the training?

- How have the different activities (if asking about a range of activities) supported their capacity-building? Which were the most useful?

Outcome Harvesting

Sometimes it can be hard for us to measure impact by following developments from X to Y because we can't realistically keep following up on all participants to evaluate how the training is having an effect on their way of working, etc., and if this eventually results in institutional and societal change. Instead, we might need to identify the change (Y) and then work backwards to see if our activities played a role in creating this change.

This is a method called *outcome harvesting* that focuses on collecting evidence of change and then working backwards to determine whether and how specific activities have contributed to that change.

Outcome harvesting is most useful under three conditions:

1) when the focus it mostly on outcomes/impact (i.e. the real change we want to see) as opposed to on things such as number of trainings carried out, number of people engaged.

2) in complex situations where the relationship between cause and effect is not fully understood and/or where many different actors influence change.

3) when stakeholders want not only to identify change, but also to learn about how and why those changes were brought about to improve future performance

Source: Outcome Harvesting, INTRAC (2017)

While you may require external Monitoring, Evaluation and Learning expertise at the analysis stage of an outcome harvesting approach, organisations ought to be responsible for collecting data to assist in this analysis. Essentially, you are collecting the pieces of a jigsaw that an external evaluator can then put together.

Types of data collection that can assist in an outcome harvesting approach include any evidence of changes occurring at a higher level. These depend on the project's end goal, but may include evidence of such changes as conduction of fair trials in line with international standards, changes to legislation and increased trust in the legal system.

Evidence of such changes may be found in:

- Legal reports

- Media reports/press releases

- Interviews with key stakeholders

- Research reports and surveys

Evidence boxing

A good system for storing such data is 'evidence boxing'. This is as simple as having a folder (or folders) online or on a shared network where all the evidence of any of the type of changes mentioned above is kept. All team members should be briefed on what to look out for and where to store it.

DATA COLLECTION METHODS OVERVIEW

Method	M&E Q. 1 Are you doing what you said you would?	M&E Q. 2 Are you making a difference?	M&E Q.3 Are you doing the right activity?	Time and effort
Attendance sheets	Who is attending	N/A	Helps with follow-up	Quick and simple

Feedback forms (participants)	Questions can be designed to respond to this	Subjective measure of capabilities, opportunities and motivation	Doesn't give us information on the long-term effects/impact of the training	Relatively quick
Pre- and post-training tests (participants)	N/A	Objectively measures change in capability and motivation	As above	Longer to design, quick to complete
Observations (trainers/members of organisation)	Observations can confirm whether the activity meets Q.1, but only subjectively	Provides indications of observable changes, but requires validation	As above	No effort for participants, more effort for trainers/organisation members
Follow-up with participants (surveys and interviews)	N/A	Can validate behaviour change	Can determine impact of behaviour change	Requires a commitment to make contact and chase participants
Interviews with key stakeholders	N/A	Can somewhat help to answer Q.2	Can help to determine impact	Takes time to contact stakeholders
Outcome harvesting	N/A	Can somewhat help to answer Q.2	Can help to determine impact	Data collection isn't time-consuming if processes are in place

M&E Strategy Planning Table

Considering your list of focused questions and targets, you can think about what data it is that you want to capture and what are the most appropriate methods for data collection.

By completing the strategy planning table, you will determine for each method:

- What approach is going to be used and which questions it will aim to answer

- Confirm the sources of data (the people or documents/resources)

- The preparations required before it can be delivered (and by whom)

- How it will be delivered (and by whom)

- How the data will be recorded/stored (and by whom)

The strategy should also confirm what the data will be used for and how this will be managed, e.g. to upload the data into a spreadsheet and for this to be relied upon to draft a report or to provide feedback during a future planning of the project.

You can ensure that the strategy is relevant by checking that all your focused questions are incorporated into the methods and referring to the principles of M&E.

Data Collection Method	Sources of data	Focused questions it addresses (Universal Question No.)	Preparations By whom?	Delivery By whom?	Where data is recorded & stored By whom?
Example: Pre-workshop survey	*All training participants*	*Participant Demographics (1) Pre-Knowledge (2) Motivation (2) Opportunities (2)* *Expectations of workshop (3)*	*Design survey alongside training content development*	*Handed out to participants at beginning of training – time provided to complete this.*	*Facilitator will keep hold of completed paper surveys*
			Facilitator responsible to print surveys before event	*Facilitator*	*Facilitator will scan surveys & store digitally, or enter data into a spreadsheet*

Part 3: Analyse and Adapt

Data Analysis

Once you have collected data through adopting a range of tools you judged to be appropriate to the context, the data is only useful if you're able to take the time to analyse it (a factor that ought to be built into the training and MEL plan).

It is likely that you will need to incorporate more than one stage of data analysis into your MEL plan, such as shortly after the training to analyse data collected through feedback surveys, pre- and post-tests and observations; and then at a later stage after you have conducted follow-up surveys and/or interviews with participants.

Data Analysis Steps

1. Consolidate and organise data

After data collection and before data analysis, you need to consolidate and process the data. This means that raw data from surveys and other data collection instruments needs to be organized into usable formats, such as spreadsheets. Online survey tools typically provide spreadsheets ready to download.

Processing data involves cleaning data – removing any errors in the data by correcting or deleting them and coding data – the process of organizing and assigning meaning to data. For small amounts of data collected through monitoring trainings, cleaning the data should be straightforward.

A useful way to code such data would be by using the three M&E questions as main categories, in order to identify 'answers' to these questions. Data falling under question two (behaviour change) could be coded according to the subcategories of capability, opportunity and motivation.

2. Descriptive statistical analysis

For evaluating a training, descriptive analysis should be sufficient. This involves describing the general characteristics of a set of data, such as through counts and percentages. The most basic statistic would be the number of people who attended the training, with a more complex statistic being a calculation of knowledge gain. It is good practice to calculate percentages for quantitative data, such as questions answered on a scale, while noting how many participants responded to the survey so that percentages don't obscure the actual numbers that responded a certain way.

3. Summarise qualitative data

Rather than transcribing all the qualitative data in, it is acceptable to provide a summary of findings, while indicating how many people answered a certain way. This should be done to reveal patterns, rather than distort them – patterns that should start to reveal themselves when coding data. Sometimes it may be possible, and useful, to suggest what the findings show, but any suggestions should be clearly highlighted as such.

The presentation of qualitative findings should be integrated into the presentation of quantitative findings in a way that provides further insight into statistics. The training report template below suggests a way to structure the presentation of findings.

4. Disaggregate

As part of your analysis, it is important to disaggregate data to identify any differences between the effects of the training on different groups of participants. The ways in which you are able to disaggregate data will depend on the demographic information you gathered at the time of data collection. Typical variables for which to disaggregate data include gender, profession and location.

It can also help provide more insight into findings to disaggregate one set of answers based on the answers to a different question. For example, the number of people who said that the training had improved their knowledge and also said that they would be able to put this knowledge into practice. This is simple to calculate if there is a spreadsheet of the data but is, of course, more time-consuming if you are making calculations directly from individual survey forms.

5. Triangulate

To increase the reliability of your findings, it is important to triangulate data – that is, cross-checking data collected through different methods or sources. Triangulation helps to verify findings, as well as identify inconsistencies. It is particularly important to triangulate qualitative data. For instance, when conducting interviews, making sure that a number of stakeholders are consulted so that you can compare different people's accounts.

Training Report Template (output and outcome level)

Q.1: Did you do what you said you were going to do?

- No. of participants and participant demographics

- What was delivered – training contents and methods (including a note of any planned activities that didn't take place and any unplanned activities that took place)

- Who was involved in preparing and delivering the training?

- Quality of the training outputs – questions to consider here include:

    - Were the methods used effective?

- Was the content at the right level and included all necessary information?

- Were the trainers appropriate?

- What was the added value of having pro bono experts involved?

- Sources of information:

  - Quantitative findings from feedback surveys, such as % of participants satisfied with the training

  - Qualitative data from feedback surveys and observations, such as feedback on which parts of the training they found the most and least useful, suggestions for improvement, etc.

Q.2. Did you make any difference?

- Have participants acquired new skills and knowledge from the training?

  - Relevant quantitative and qualitative data from pre- and post-training tests (including: % knowledge gain), feedback surveys, observations and follow-up calls

- Are participants motivated to change their approach?

  - Relevant quantitative and qualitative data from pre- and post-training tests (including % confidence gain), feedback surveys, observations and follow-up calls

- Are participants likely to apply these new skills and knowledge?

  - Relevant quantitative and qualitative data from feedback surveys and follow-up calls

- Do participants need any further support in order to apply their new capabilities?

  - Relevant quantitative and qualitative data from feedback surveys, observations and follow-up calls

Using Findings – Adapting Your Training

Once you have produced a report of your findings and circulated this with other team members, it is time to use your findings to assess if your strategy makes sense. If not long after the training when you have only had time to collect data on the immediate results of the training, it will only be possible to test your strategy at output and outcome level – that is, if you were able to do what you said you were going to do (Q.1) and if the training made any difference to participants (Q.2). It is useful too, at this stage, to identify what information you were unable to attain and what more information would be useful to gain when following up with participants.

Conducting debriefs with the involved members of your organisation about the training – with reference to the findings – is a useful way to strategy-test your training and programme to ensure that everyone is involved in deciding upon changes.

This is also a good time to assess the quality of the Monitoring, Evaluation and Learning strategy. If you have found, for instance, that the data you collected has left you not being able to answer all of the questions, or unsure of the reliability of your findings, it suggests that you may need to review some of your data collection tools or apply different data collection methods.

Further Resources

Project cycle planning and M&E

- ROLE UK: Monitoring & Evaluation Toolbox
- Legal Assistance for Economic Reform. *The why, what and how of monitoring and evaluation: guidance for providers of international pro bono legal assistance*
- Project Management for Development Organisations (pm4dev.com) has a comprehensive list of manuals and guidelines for use in development project management on its site: https://www.pm4dev.com/resources/manuals-and-guidelines.html
- Toolkit for Monitoring and Evaluation Data Collection, Pacific Women Shaping Pacific Development

Outcome Harvesting

- *Outcome Harvesting,* INTRAC, 2017
- *Outcome Harvesting*, Better Evaluation *(https://www.betterevaluation.org/en/plan/approach/outcome_harvesting)*
- https://outcomeharvesting.net/home/