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A guide for selecting

Monitoring & Evaluation Tools

01

Monitoring & Evaluation +Learning

Monitoring and evaluation is a combination of data collection and analysis (monitoring) and assessing to what extent a program or intervention has, or has not, met its objectives (evaluation).

Learning

Learning is taking the information and insights acquired in the first two steps (M&E) to make critical strategic decisions. These informed decisions can be at a management level, a program design level, or anywhere in between.

The point is to use the data and results obtained from analyses to breed accountability into an organizations' activities and also into the M&E process itself.

Learning can take place during Monitoring, Evaluation, or both. It recognizes that programs need to be able to respond to the dynamic nature of impact-seeking activities. By applying data-driven insights at various intervals, an organization can better achieve the outcomes it seeks for its beneficiaries.

02

Benefits of M&E

It is different for each stakeholder.

Stakeholders are organizations, individuals or groups that are concerned about the activities of a business. Stakeholders can be internal or external and each group has a different interest in the company.

Executive management

Determining changes to strategic direction becomes much more data-driven with the ongoing data and analyses from M&E processes. Adaption ideally becomes more agile. With relevant and comprehensive data (both process-related and impact-related), executives can build much more persuasive arguments.

Employees: Workers

M&E can generate more buy-in and trust in the organization's commitment to the mission. It helps if there is an apparent effort to not only assess progress but use that assessment to get better at delivering impact. For employees in contact with beneficiaries (e.g. "on the ground") conducting an evaluation, assessment can also generate more trust between those employees and the beneficiary community

New, often unforeseen, insights can emerge, helping employees discover new, more effective ways to deliver programs and create impact.

Funders

Money for impact flows to where the data is, and proper M&E implementation can open up that flow because it breeds impact credibility. A more precise understanding of how much impact can be generated, more investment dollar comes in.

02

Benefits of M&E

It is different for each stakeholder

End Beneficiaries: Customers: Community
Feedback processes (data collection) is a sign that the organization cares about results, and learning from it to make outcomes better. Data can be used to improve the efficiency of implementation as well as implementation design.

Government
Government is an external stakeholder but is not directly tied to the organization. M&E enables government in making correct policy changes for example carbon emissions. The government decision affects the operations of any business with increased levels of carbon.

Environment
The natural environment can be affected by a company's activities and, through channels such as climate change, can have an effect upon the company. Climate change combines power, legitimacy, urgency and proximity damaging the ability of business to operate, withholding resources, impacting products, market and infrastructure.

Suppliers
Suppliers are external stakeholders. Data-driven decisions can provide inputs and affects how an organization buys raw material, equipment, etc. Demand for supply chain transparency is increasing with new generation.

03

Monitoring Strategy

Ideal questions to be asked:

- *What key metrics can give us an idea of the state of program implementation?*
- *Do we have lean data collection and analysis processes?*
- *How efficiently are we implementing our program(s)?*
- *Based on the data acquired, do we need to make any changes to our program(s)?*

A monitoring plan usually focuses on the processes occurring during the implementation of a program.

04

Creating a Monitoring and Evaluation Plan

Quantitative Tools of Evaluation vs. Qualitative

Putting quantitative (or qualitative) tools to work means defining the right indicators to measure.

In the planning stage, define the indicators that will be used throughout the monitoring and evaluation. Indicators can be both quantitative and qualitative, depending on what needs to be measured and in what ways.

Quantitative M&E Indicators

Primarily output-focused, they help organizations determine if activities are taking place, when, and to what extent. By definition, numbers are used to communicate quantitative measures (percentages, ratios, $ sums, etc.)

Qualitative M&E Indicators

It involves subjective terms and often outcome-focused. They can help organizations determine if a change has occurred by gathering perceptions from the stakeholders. Data accuracy can often be difficult to assess given the subjective nature of the collecting judgements about change (see example below)

05 Determining Attribution

Using a Combination of Indicators

Let us take an example of a quantitative indicator, a number of shoes donated. As we can see, a pure count of shoes donated doesn't tell us what impact has been generated. By also collecting qualitative, outcomes-focused data, the organization gets a better idea of the impacts of those shoes for people who before did not have them.

The best indicators help organizations make a clear attribution between the intervention (shoes given) and the impact(s) generated. In this example, there are many other variables that could contribute to an increase in opportunities generated by reception of shoes. Gathering qualitative data, (specifically asking to what extent the shoes had to do with any observed changes in those areas) would help to increase the level of attribution the organization might report.

06 Evaluation

Evaluation Models Depend on Organizational Context. Determining an evaluation method depends on the organizational objectives.

They are determined by asking:

What is the impact being sought?
What is the purpose of the evaluation?

In addition to those objectives, other variables include the context of the target beneficiary group and the organizational resources available (money, skills, tools, etc.). Of course, the focus should be given to achieving the overarching objectives.

The following, while not an exhaustive list, are some examples of the main evaluation approaches which accomplish unique organizational objectives.

07
Types of Evaluations

In project evaluations, examinations are basically conducted in view of all five evaluation criteria, Relevance, Effectiveness, Efficiency, Impact, and Sustainability. Depending on the timing of the evaluation study, the perception of each issue is different. Depending on the evaluation it can have different project cycles: ex-ante evaluation, mid-term evaluation, terminal evaluation and ex-post evaluation.

Formative Evaluation

A formative evaluation often conducted before a program begins to examine both feasibility and determine its relevance to the strategic objectives of the overall organization.

Process Evaluation

A process evaluation is carried out during the implementation phase of a program. As the name suggests, it focuses on processes being carried out -- inputs, activities, outputs, etc. It identifies any issues with the efficiency of implementation.

Outcome Evaluation

An outcome evaluation aims to determine whether overall program objectives met. In that process, practitioners also identify what might have spurred or limited those changes. Finally, it helps shed light on unexpected changes in the target beneficiary population at the end of the intervention or at the point of evaluation.

Impact Evaluation

An impact evaluation gets to the heart of a program’s actual effectiveness by determining attribution. Changes observed (outcomes) can be causally connected to the activities carried out during the program period. Timing is an essential element of any impact evaluation. Conducted too early, the intervention has not had time to create observable change. Conducted too late, it could reduce the usefulness of insights for informing decision-making.

08

M&E Tools

Some examples of monitoring and evaluation tools

Directed towards the development sector, Delta offers practitioners tools for both the planning, tracking, and measuring stages of M&E. They specifically highlight NGOs, International Development Agencies, and Universities as some of their key target segments.

DevResults in perhaps the most robust M&E platform designed based on results framework. With DevResults, you can set up your program's results framework , and define indicators to measure progress. You can then log your program's progress in granular detail.

The challenge for this kind of platform is an extended implementation period and cost.

In addition to offering a multilingual platform with the necessities for M&E (defining indicators, etc.), they provide a mobile application integrated with the platform to facilitate data collection.

An end-to-end management solution for M&E needs, Impact Cloud, is a cloud-based platform
that enables practitioners to house and manage data, conduct analyses, create reports, and collaborate across teams. It is designed to facilitate impact data management for organizations of all types and sizes.

08
M&E Tools

Some examples of monitoring and evaluation tools

NVIVO

One of the most significant benefits of this software is the ability to manage diverse types of data, from text and audio to video and online surveys. An automated transcription feature adds to the efficiency-boosting nature it provides for qualitative data analysts. It is designed for qualitative research.

ToIaData

TolaData offers real-time data management, combining built-in data collection features as well as import capabilities to manage data collected offline. A results-framework feature complements the analysis tools so that users can track how they are doing in reaching their impact goals. It is used at small & midsize NGO level.It is easy to setup, integrates data feed from a few offline tools. It has limitation of reliance on results framework, limited scalability, limited dashboard, basic scorecard & no professional impact reporting.

SYNERGY INTERNATIONAL SYSTEMS

While not as complete a solution, Indicata gives impact practitioners the tools necessary to execute data-driven processes in the M&E journey. Like the Impact Manager, Indicata can help with data collection, analytics, and visualization (through its dashboards features).

09
Limitations of M&E software today

Many M&E Softwares are legacy softwares, and they suffer from:

- **The rigid framework** that does not allow to define appropriate social impact context required for each unique initiative.
- Long and tedious **implementation time**. Most software implementation can take a long time to customize and implement.
- **Cost** is significantly high.
- By the time implementation completes, the requirements may change. This creates a tremendous **change in control risk**.
- **Some of the features such as project management** is best as an external integration solution as many new-age online products are available. It can save the cost and complexity.

> ***Lack of cause-and-effect linkages, not easy to quantify, fear of framework, and cost.***

5 Mistakes to avoid in M&E System Selection

1. Many Features Increases Implementation

Organizations needing M&E software often start by hiring a third party M&E software evaluator who can help them define the RFP for M&E software selection. The first sin, if an organization begin this process without key goals or requirements. In the absence of such clarity, the M&E software evaluator (who may or may not have prior experience of implementing M&E software) will start with a commonly known results framework. She/he will look for a software that meets defined criteria, resulting in a long list of features which may not be core requirements for the organization. While a system with all features may look very comprehensive, the implementation can go beyond 1+ year. It also requires significant investment and adds considerable execution risk.

2. Results Framework = Tight Coupling

The results framework describes how a program interventions contribute to the ultimate results through cause-and-effect linkages, i.e., associating lower-level results that contribute to output or outcome to the overall goal. However, these frameworks often have not been able to trace factors that can influence the results.

Most Monitoring & Evaluation softwares have failed to provide a mechanism to aggregate survey data. The data as a baseline, midline, and exit line, and represent the results visually to understand change. While this is not a limitation of the framework, it is a flaw in M&E software. A limitation of the framework is that, if program managers are fearful of not reaching the objective, they feel they might get penalized for reporting the negative outcomes.

3. Data Collection is NOT Monitoring and Evaluation

While data collection is an important function, in reality, it is only one part of the big monitoring and evaluation puzzle. A complete monitoring and evaluation process requires, connecting funder's impact framework with other supporting organizations and aggregate results from many online and offline data collection sources. Unfortunately, both data collection tools and most Monitoring & Evaluation systems are designed based on limited or rigid data collection approach, and do not solve any data aggregation challenges.

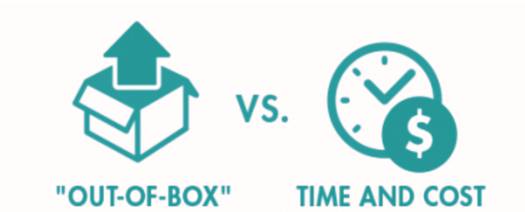
On the other hand, the modern M&E platforms empower downstream organizations with a better and easy to use data aggregation system so that they can find faster outcome results with a Lean Data approach.

4. Monitoring & Evaluation is NOT about Activity Reporting

Traditional M&E systems excessively focus on activity reporting.
Empower stakeholders to demonstrate their voice so that the program, service, and provider have a short feedback loop. Reduce the distance between funders, top-level, and downstream organizations. Even if you implement the best M&E software, at best they are good at collect project-level reporting. Decentralized organizations may have a challenge of rolling up the aggregated result.

5. Customization-based Systems Will Increase Cost & Risk

M&E systems should guide organizations to log in and implement their impact strategy, metrics, and survey in a short time. This approach puts program management or evaluation management staff in the driving seat, allowing them to configure changes over a long time adapting to changing metrics or reporting requirements.



11

Data Flow: distributed, decentralized and hierarchical

Many international development organizations employ a distributed, decentralized, and hierarchical approach. This creates many challenges for stakeholders, both internal (teams), and external (partners, funders, etc.).

Challenges:

Inconsistent reporting to funders:
It is difficult to get a clear, transparent picture of what, how, and how much impact programs are achieving. An added difficulty is if different standards are used at each level of data collection, analysis, and reporting.

Inconsistent data collection processes at multiple locations
If team members are using different tools for data management, it can create huge reliability issues within data sets.

Long reporting cycle
Often because of resource limitations, organizations may not be employing M&E processes from the start and often enough. This could reduce the visibility of the impact generated, while also making it near impossible to have it in a dynamic contextual manner.

12 Geographical Challenges

> INTERNATIONAL NGOS, DEVELOPMENT FINANCE, AND TRADITIONAL DEVELOPMENT AGENCIES

Unlike development agencies, International NGOs typically have a headquarter in western countries such as the US, Canada, or Europe. They often act as a funder to the program organizations in different countries. These country offices often act as decentralized units and follow different processes. The challenge with that approach is headquartered often needs much faster visibility of financial, donor, operational, and social Impact data which they do not get.

Traditional M&E software does not provide any support similar to the data warehouse for the country-level offices. These offices often collect data in the form of paper, offline mobile data collection, or local IT systems. However, aligning data requirements between different offices becomes challenging.

Mid and Large size development finance institutes often are faced with inherent limitations of results framework based design. This approach seems to make the process of impact data aggregation time-consuming.

13
Future State of M&E Systems

Most M&E Systems were designed 10-20 years ago. Organizations continuing to use these outdated systems will continue to face mounting challenges because of their lack of nimble functionality/adaptability.

What should a future M&E solution look like?

Program Data Aggregation as Data Warehouse
Be able to manage all the data in one place accessible to on the ground workers, directors, and funders.

Integrated Impact Learning
Better data analyzing capability to extract important impact insights.

Social Impact & Outcome Management
Create impact strategies, execute, track/measure, analyze, improve, and report all in one platform.

14
Game Changer Flexibility

Traditional M&E Software and SoPact Impact Cloud® both have similar goals. However, their approaches are completely different.

Traditional M&E

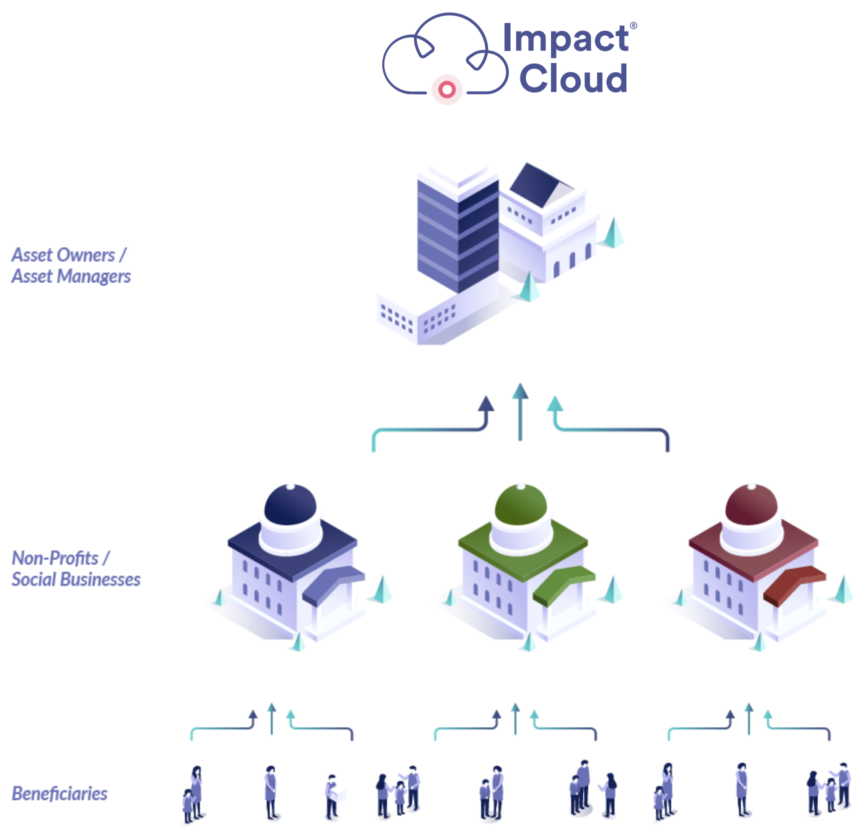
- Tightly coupled with results framework
- Has only custom indicators
- Limited reporting format
- Limited qualitative and quantitative alignment
- No concept or scope of SDG alignment
- Based on rigid reporting framework approach
- Focuses on results aggregation and does not provide any support for data aggregation at the downstream level
- Downstream impact organization often do not learn social impact through lean data approach

SOPACT
ImpactCloud®

- A flexible impact framework unique to each organization's unique need
- Start your impact journey with the theory of change
- Save time with global impact indicators
- Multiple reporting formats
- Unlimited qualitative and quantitative alignment
- Aligns with sustainable development goals (SDG) and global indicators
- Simplifies top level portfolio data aggregation
- Easier alignment with the downstream, decentralized organizations

15
How to have deeper impact by Listening to every Stakeholder?

Integrate qualitative and quantitative analytics and simplify data aggregation from different data sources such as paper, online survey, offline survey and custom database. Unleash the power of stakeholders voice to improve program effectiveness and augmented impact capital.



"Fewer people touched deeply may be worth more than many people hardly affected."

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