SESSION 4 – SETTING UP THE MONITORING AND EVALUATION STRATEGY (P1)

Training on Monitoring and Evaluation of Training Programmes for Professional Development in LSG
Learning objectives

• To strengthen the understanding of the preliminary processes that are indispensable for the implementation of a Monitoring and Evaluation Strategy, specifically the first steps:
  • describing the context,
  • defining the goals
  • selecting the criteria
  • setting the benchmarks for the evaluation

Learning outcomes

• Participants understand the relevance of preliminary processes in setting up the M&E Strategy
• Participants acquire an in depth understanding of the first steps of the preliminary processes for the setting up of M&E Strategy.
SETTING UP THE MONITORING AND EVALUATION PROCESSES

WHAT ARE THE FIRST STEPS FOR SETTING UP THE MONITORING AND EVALUATION STRATEGY?
Monitoring and evaluation of the training programme implies a number of steps to be taken including:

- Definition of the context
- Definition of goals
- Selection of criteria
- Setting the benchmarks for evaluation

**MONITORING AND EVALUATION STRATEGY FLOWCHART**

1. **Describing the Context**
   - Ref. Section 3.4.1, pp. 21-23; Section 4.1, p. 28

2. **Selection of Criteria for Evaluation**
   - Ref. Section 3.4.2, pp. 23-24; Section 4.3, pp. 28-29

3. **Setting the Benchmarks for Criteria**
   - Ref. Section 3.4.2, pp. 23-24; Section 4.3, pp. 28-29

4. **Identification of the Comprehensive List of Indicators for Each Criterion and for All the Phases of the Evaluation Process**
   - Ref. Section 3.4.3, pp. 24-26; Table 28, pp. 60-64

5. **Identification of All the Tools Needed for Gathering Data in Order to "Build Up" the Identified Indicators, for All the Phases of the Evaluation Process**
   - Ref. Section 4.4, pp. 37-38; Section 4.5, pp. 38-59

6. **Setting the Milestones In-Itinere Evaluation of the Programme**
• A context of the training programme comprises information about the institutional environment in which the intervention takes place.

• The context is meant as the sum of the features characterising the training programme design and implementation, the participants attitudes and experiences, the environment hosting the intervention.
• The next step includes definition of training programme monitoring and evaluation goals.

• These goals may include deciding on the merit of a training programme, improving the training programme, increasing the knowledge about the operating mechanisms of the training programme, increasing the learning ability of players etc.

• Defined goals serve as the relevant ground for further steps of selecting relevant indicators, criteria and tools – elements which would finally bring to the same goals’ achievement.
• The selection of the criteria for the evaluation is very closely linked to the degree of complexity/level of development of the overall training system for professional development local government.

• Complex and solid systems, with sufficient resources and capacities (i.e. financial resources, human resources, etc.) might require the use of an extensive list of criteria.

• Systems that are in an incipient phase of development, the evaluation might be operated based on key criteria.

### SESSION 4 – Selection of the Criteria for the evaluation 1/2

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>DEFINITION</th>
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<tr>
<td><strong>Input</strong></td>
<td>Resources dedicated to the implementation of the course</td>
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<tr>
<td><strong>Output</strong></td>
<td>Amount of produced activities and reached beneficiaries</td>
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<td><strong>Internal consistency</strong></td>
<td>The logical connection between the activities that put the intervention into effect</td>
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<tr>
<td><strong>Outcome</strong></td>
<td>Benefits of the intervention in terms of beneficiaries and their context of activity</td>
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<tr>
<td><strong>Effectiveness</strong></td>
<td>Link between the initiative and its outcome</td>
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<tr>
<td><strong>Impact</strong></td>
<td>Total expected effects (positive/negative, intended/not intended), registered in the context of implementation</td>
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<tr>
<td><strong>External consistency</strong></td>
<td>Consistency with relevant policies</td>
</tr>
<tr>
<td><strong>Efficiency</strong></td>
<td>Ratio between costs and output/outcome of the intervention</td>
</tr>
<tr>
<td><strong>Adequacy (utility, external effectiveness)</strong></td>
<td>Level of coverage of the total need achieved by the outcome</td>
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<tr>
<td><strong>Compliance</strong></td>
<td>Meeting beneficiaries needs and expectations</td>
</tr>
<tr>
<td><strong>Reliability</strong></td>
<td>Reliability of the implementing/delivering organisation of the initiative</td>
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<tr>
<td><strong>Sustainability</strong></td>
<td>Expected duration of effects over time.</td>
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<tr>
<td><strong>Sinergy</strong></td>
<td>Coordination of activities and resources</td>
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<tr>
<td><strong>Process</strong></td>
<td>Cause-Effect chains</td>
</tr>
<tr>
<td><strong>Transferability</strong></td>
<td>Replicability of the intervention in other contexts</td>
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The selection of the criteria for the evaluation is a political choice/decision, that must be operated (by the coordinating organism) in a preliminary phase of setting up the Strategy for Monitoring and Evaluation;

Such decision might reflect/respond to the following aspects:

- The goals of the evaluation;
- The resources for the implementation of the evaluation;
- The existent capacities for implementation of the strategy;
- Etc.

Example:

- if the M&E System is newly established, the chosen criteria might concern basic aspects such as Efficiency, Effectiveness;
- if the M&E System is consolidated, the chosen criteria might be more complex and look in to reliability, impact, etc.
• Setting the benchmarks for the selected criteria refers to setting the “threshold” for the evaluation, and that is the standards within which the evaluation is performed?

Example:

• What is the value that “satisfies” the efficiency criteria?
SESSION 3 – Guided debate

Q&A?
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