MONITORING AND EVALUATION

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Phases of Project Management

Initiation | Planning | Monitoring and Evaluation | Implementation | Closure
Overview

• Common monitoring and evaluation (M&E) concepts for project management

• Practical application of M&E at APHL
Objectives

• Describe the importance of M&E in project management

• Use APHL metrics to measure project outcomes

• Identify APHL process and outcome measures
Monitoring and Evaluation: What is it all about?

**Monitoring**

Regular collection of data and information to track the progress of the project and achievements of the project goals.

**Evaluation**

Systematic and objective assessment of an intervention and how well it met the expected goals.
M&E Concepts

**GOAL**
The broad need you are addressing and change you expect (from the project initiation document-PID or Project Charter).

Example: Conduct 30 training webinars within 12 months

**INPUTS**
The resources you have for your project. The project budget.

Example: personnel time, facilities, equipment, SMEs, infrastructure, partnerships, etc.
M&E Concepts

**ACTIVITIES**

What you can do with the resources. Found in detailed work plan (statement of work, Project Charter, Project Management Plan).

Example: All the work that’s required to achieve a goal.

**OUTPUTS**

Direct products of activities. These are your deliverables.

Example: The actual workshop or trainings, the toolkits or guidance documents created, the publications posted on aphl.org.
M&E Concepts

OUTCOMES

The changes in behavior or performance or service delivery as a result of the activities.

Changes in learning, action and conditions.

- Short term
- Intermediate
- Long term
Output and Outcome Differences
Example of Outputs and Outcomes

Packaging & Shipping Training

• **Output**
  • Number of virtual webinar seats that are offered

• **Outcomes**
  • **Short term**: module built, tested, works and is distributed and has immediate knowledge gained (passed the exam, got the training certificate)
  • **Intermediate**: SOPs up to date and their P&S process is accurate, their employer certifies staff
  • **Long term**: All packages are safely handled, inspection does not result in fines
Example

New Toolkit for CLIA Internal Audits

• What’s the Output: ?
• What’s the Outcomes?
  • Short term:
  • Intermediate:
  • Long term:
Monitoring and Evaluation: Why does it matter?

- Assessing the performance of intervention to improve current and future management of outputs, outcomes and impact.

- Demonstrate the benefit of investing in an activity. What are we getting for our resources?

- How can we improve? How can we do better?
Monitoring and Evaluation Differences
M&E Targets

In most cases, you will need to establish a target for the project outputs and the project outcomes.

Why?
P&S Targets for Outputs and Outcomes

Packaging & Shipping Training

Output: number of virtual sessions completed; number of participants

- **Target**: 30 virtual webinars completed; 100% of seats are filled
P&S Targets for Outputs and Outcomes

Packaging & Shipping Training

Outcomes

• **Short term**: Module built, tested, works and is distributed and has immediate knowledge gained (passed the exam, got the certificate)
  • **Target**: 90% pass the exam

• **Intermediate**: SOPs up to date and their P&S process is accurate, their employer certifies them
  • **Target**: >50% of processes are compliant with regulations
  • **Target**: At least 80% of attendees are certified or recertified

• **Long term**: All packages are safely handled, inspection does not result in fines
  • **Target**: Passed inspection, no deficiencies/fines
Toolkit Targets for Outputs and Outcomes

New Toolkit for CLIA Internal Audits

Output: number of toolkits produced

• **Target:** 1 toolkit published on APHL web-site
Toolkit Targets for Outputs and Outcomes

New Toolkit for CLIA Internal Audits

Outcomes

• **Short-term**: Toolkit is promoted to PHLs (Quality Managers) and the toolkit is being accessed -- awareness
  
  • **Target**: 9 promotions (eUpdate, eblast, CoLLABorate); 50 unique page views
    
    Include any discussions (committees, workgroups, CoLLABorate)

  • Intermediate: Toolkit is being used
    
    • **Target**: 50% of PHLs have used at least one section of the tool; 80% agree or strongly agree the tool helped prepare for an external CLIA inspection
      
      Include stories of change

  • Long term: PHLs have less deficiencies during external CLIA inspections
M&E Targets

• What do you do if you don’t know the target?
• What happens if you don’t achieve the target?
• What happens if you exceed the target?
M&E: How do you measure?

- Surveys
- Focus Groups
- Google Analytics, eBlast, Magnet Mail- page views, click rates
- Real-time Polls
- Attendance Rates
- Interviews and Stories of Change
M&E: How do you interpret?

New Toolkit for CLIA Internal Audits

- **Short-term**: Toolkit is promoted to PHLs (Quality Managers) and toolkit is being accessed -- awareness
  - **Target**: 9 promotions (eUpdate, eblast, ColLABorate); 50 unique page views
  - **Reality**: 9 promotions; 25 unique page views

- **Intermediate**: Toolkit is being used
  - **Target**: 50% of PHLs have used at least one section of the tool; 80% agree or strongly agree the tool helped prepare for an external CLIA inspection
  - **Reality**: 30% PHLs; 93% agree/strongly agree
M&E: Consensus

The project team needs to ensure they are agreement with their sponsor early in the planning process, including the budget

- What will be monitored and how frequently
- How data will be collected and reported
- What is the expected targets

If a project is repeated multiple times, the project team needs to ensure they are agreement with their sponsor on how M&E data will be used for lessons learned and continuous quality improvement
M&E Practices at APHL

• You are not alone!
  • Finding SMEs with similar projects- don’t reinvent the wheel
  • QSA Team is here to help

• Design M&E in the planning stages of the project

• Use APHL knowledge bank of measures
  • QSA is collecting description of outcomes by themes of different types of projects and data collection tools

• Streamline how data and information is collected

• Visuals are powerful
Key Learning Points

• M&E is important to think about all phases of a project
• Output is easy but not everything, Outcomes and Targets provide details on the effectiveness of the project
• APHL QSA (TWD) is here to help
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- [www.pmi.org/certifications](http://www.pmi.org/certifications)
Thank You!

Questions?