

# RESULTS-BASED MONITORING AND EVALUATION SYSTEM EFFECTIVE SERVICE DELIVERY



From this point of departure, it is essential that leaders, managers, teams and individuals in organizations, public and private, develop their skills to understand, track and report on monitoring and evaluation. This course on Monitoring & Evaluation will empower you to understand, direct and implement the phases of a robust and results-based M&E framework.

## WHO SHOULD ATTEND

- Directors, Managers, Supervisors and Team Leaders who have subordinates reporting to them;
- Decision-makers who are looking at new ways to redesign their own operations to make them more participatory and responsive to local needs;
- Program/Project Staff in community development



## Course Timings:

Registration will be at 08:00 on Day One. Course sessions will start promptly at 08:30 and end at 15:30. There will be two short breaks for refreshments and lunch will be served at 12:30 of each day's sessions

### PURPOSE OF THE PROGRAM

Many people think of monitoring and evaluation as taking a snapshot of outcomes at the end of a service delivery to prove to the politicians, communities and authorities expected results have been achieved or failed. These same people don't hold monitoring and evaluation in much regard because they feel they are getting too little information too late in the day, especially if their operations fell short of expectations or made no difference at all. Monitoring and Evaluation can, and should, however, be used as an ongoing management and learning tool to improve an organization's effectiveness.

Therefore, managers and supervisors can and should conduct internal monitoring and evaluations to get information about their operations and programs so that they can make sound decisions about the implementation of those activities. Internal monitoring and evaluation should be conducted on an ongoing basis and applied conscientiously by supervisors and managers at every level of an organization in all program areas. In addition, all of the program's participants (managers, staff, and beneficiaries) should be involved in the evaluation process in appropriate ways. This collaboration helps ensure that the monitoring and evaluation is fully participatory and builds commitment on the part of all involved to use the results to make critical operations improvements.

### DURATION: 5 DAYS

### WORKSHOP OUTLINE

#### DAY 1

#### MODULE 1: FUNDAMENTALS OF MONITORING AND EVALUATION

- ✓ Operational definitions of monitoring, evaluation, review and assessment
- ✓ Difference between monitoring, evaluation, review and assessment
- ✓ Importance of monitoring and evaluation in projects/programmes and the institution
- ✓ Types of monitoring and evaluation
- ✓ Planning and implementing participatory monitoring
- ✓ Defining key performance areas (KPIs) and indicators.

#### MODULE 2: LEGISLATIVE, STRATEGIC AND OPERATIONAL FRAMEWORK OF MONITORING AND EVALUATION

- ✓ Understanding the Legislative Mandates and Obligations (Constitution; Acts and Policies that Impact On Operations.)
- ✓ Fundamentals of Green Paper on National Strategic Planning and Presidency Approach on Improving Government Performance
- ✓ Understanding the Strategic Objectives, KPIs and KPIs
- ✓ Linking Business Plans to Strategic Plan
- ✓ Linking Performance Contracts to Both Business Plan and Strategic Plan
- ✓ Importance of Work Plans (Yearly, Quarterly, Monthly, Weekly and Daily)

South Africa Tel: + 27 11 549 5668 | Mobile: +27 78 512 0481 | USA Tel: +1 870-600-0641

Email: [info@oseasonsevents.co.za](mailto:info@oseasonsevents.co.za) | Address: Johannesburg Fourways Broadacres, Corner of Cedar Road, and Fourways Boulevard, Johannesburg, 2191

- ✓ Understanding the Principles of Delegation, Responsibilities, Authority, Power and Accountability

### MODULE 3: CURRENT POLICY AND ORGANISATIONAL DOCUMENTS RELATING TO MONITORING AND EVALUATION.

- ✓ Concepts related to monitoring and evaluation
- ✓ Ways in which the components of monitoring and evaluation are integrated into other processes are analysed with reference to relationships at macro, mezzo and micro levels.
- ✓ The roles of key institutions/units/divisions in implementing the system are discussed with reference to performance information management and implementation strategies.
- ✓ The alignment of plans and implementation structures with reference to the implications for organisation and/or programme performance in different sectors at different levels.

## DAY 2

### MODULE 4: CONCEPTUALISE A MONITORING AND EVALUATION SYSTEM

- ✓ The components of a monitoring and evaluation system are analysed in order to explain the links between strategy, processes and structure.
- ✓ The framework for a monitoring and evaluation system is developed to assess the performance of an organisation or programme.
- ✓ Assess how monitoring and evaluation is applied in specific work roles.
- ✓ The different roles and responsibilities in a monitoring and evaluation process
- ✓ The application of a monitoring and evaluation system in specific roles.

### MODULE 5: SERVICE DELIVERY IMPROVEMENT PLAN

- ✓ **Quantity:** Are the services and products supplied in sufficient volume and diversity to sustain basic needs?
- ✓ **Quality:** Are the services and products of such quality that they will last for an appropriate period of time so that they do not have to be re-supplied at additional cost?
- ✓ **Time/Timeliness:** Are the services and products rendered on time so that customers can derive maximum benefit from them?
- ✓ **Value for money:** Is the cost of the product or service balanced against the value derived by the recipient? Irrespective of whether or not customers pay directly for products and services, it is important that the cost of the product or service is balanced against the value derived by the recipient.
- ✓ **Access:** Are the services and products being delivered at the ideal locality to relevant customers to enable them to make best use of them, without incurring undue cost to gain access to the point of delivery?
- ✓ **Equity:** Are the services and products provided without discrimination?

### MODULE 6: IMPORTANCE OF BASELINE ASSESSMENTS IN MONITORING AND EVALUATION

- ✓ Purpose of a baseline assessments

- ✓ When is a baseline assessment necessary?
- ✓ When should a baseline assessment be undertaken?
- ✓ What should be considered when planning a baseline assessment?
- ✓ Advantages and disadvantages of different ways of measuring change as a result of an activity

### **DAY 3**

#### **MODULE 7: DESIGNING THE MONITORING SYSTEM**

- ✓ Designing a Monitoring and Evaluation (M&E) System:
- ✓ Definition, aims and objectives of the system;
- ✓ Selection of relevant information and indicators;
- ✓ Tools and methods relevant for data collection and analysis in a M&E system;
- ✓ Performance indicators: What are they? Criteria for selecting performance indicators.

#### **MODULE 8: MONITORING PROCESS**

- ✓ Developing a Baseline To Guide the Monitoring Process
- ✓ Assigning Resources to Tasks
- ✓ Developing the Baseline Budget
- ✓ Establishing a basis for Quality Management
- ✓ Managing Changes to the Baseline
- ✓ Developing a Tracking System for Corrective Purposes
- ✓ Using the Performance Contracts, Business Plans and Strategic Plans to Monitor Plans and Budgets
- ✓ Analyzing Variances to Schedule and Budget
- ✓ Developing Monitoring Reports

#### **MODULE 9: QUANTITATIVE AND QUALITATIVE METHODS IN MONITORING**

- ✓ Identifying Indicators
- ✓ Gathering Information on selected indicators
- ✓ Establishing Baseline Indicators
- ✓ Focusing on key information and Optimal Indicators
- ✓ Tools and methods for analysing and interpreting quantitative data
- ✓ Assessing and judging results
- ✓ Data reduction, organisation and interpretation.
- ✓ Methods of quantitative analysis
- ✓ How to interpret qualitative data.

### **DAY 4**

#### **MODULE 10: DATA GATHERING**

- ✓ An overview of Gathering, Managing and Communication Impact
- ✓ Information
- ✓ Deciding what methods to use
- ✓ Collating, Analyzing and Storing Information
- ✓ Communicating M & E Findings for Action and Accountability
- ✓ The contribution of external reviews and evaluations to critical reflection

## **MODULE 11: KNOWLEDGE MANAGEMENT (KM) IN MONITORING AND EVALUATION**

- ✓ Understand the key differences between first- and second-generation KM
- ✓ Distinguish KM from knowledge processing
- ✓ View KM as a management discipline that seeks to enhance knowledge processing
- ✓ Distinction between knowledge and information
- ✓ Knowledge Life Cycle as a target of KM interventions
- ✓ Using Knowledge Management for decision making

## **MODULE 12: PLANNING AND MANAGING EVALUATIONS**

- Assess readiness for evaluation
- Budgeting for the evaluations
- Identifying and selecting the evaluation team
- Developing a comprehensive terms of reference (TOR)
- Identifying program stakeholders and their information needs
- Selecting appropriate communication tools for different audiences

## **DAY 5**

### **MODULE 13: OUTCOMES ASSESSMENT AND IMPACT ASSESSMENT**

- ✓ Analyze differences between an outcomes assessment and impact assessment
- ✓ Review the steps in designing an outcomes assessment
- ✓ Identify appropriate indicators to include when designing an outcomes assessment
- ✓ Learn how to choose appropriate evaluation questions for outcomes and impact assessments review how an impact assessment is designed
- ✓ Become familiar with the appropriate contexts for conducting outcomes and impact assessments
- ✓ Analyze how an organization can make reasonable assertions about its impact without doing an impact assessment

### **MODULE 14: REPORT WRITING AND PRESENTATION**

- ✓ Contents and format of an evaluation report
- ✓ Report writing skills
- ✓ Report presentation skills

# Registration Form

PLEASE COMPLETE THIS FORM AND EMAIL BACK TO [INFO@0SEASONSEVENTS.CO.ZA](mailto:INFO@0SEASONSEVENTS.CO.ZA) TO SUCCESSFULLY COMPLETE YOUR BOOKING

Company Name \_\_\_\_\_ Country \_\_\_\_\_

Tel Number: \_\_\_\_\_ Fax: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(This booking is not valid without a signature)

## DELEGATES DETAILS (PLEASE FILL IN USING BLOCK CAPITALS)

### 1st Delegate Details:

Title	Surname	First Name
Job Title	Email (required)	Telephone

### 2nd Delegate Details:

Title	Surname	First Name
Job Title	Email (required)	Telephone

### 3rd Delegate Details:

Title	Surname	First Name
Job Title	Email (required)	Telephone

## AUTHORIZATION

Title	Surname	First Name
Job Title	Email (required)	Telephone

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(This booking is not valid without a signature)

## TERMS AND CONDITIONS

**1. Payment Terms:** On the return of the registration form, full payment is required within 10 working days. Payment must be received prior to the conference date O-Seasons Events reserves the right to refuse entry into the conference should full payment not have been received prior to this date. Cancellation will be charged under the term set out below. **2. Cancellations, No shows & Substitutions:** Cancellations received in writing more than 21 days prior to the event being held carry a 50% cancellation fee. Should cancellations be received between 21 days and the date of the event, the full conference fee is payable and non-refundable. Non-payment or non-attendance does not constitute cancellation. No show will be charged the full registration fee. Cash alternatives will not be offered, however, substitutes at no extra charge are welcome. **3. Alterations to advertised package:** O-Seasons Events reserves the right to alter this programme without notice or penalty and in such situations no refunds or part-refunds or alternative offer will be made. Should O-Seasons Events permanently cancel an event, for any reason whatsoever, the Client shall be provided a credit of the equivalent amount paid towards the cancelled event. In the case of a postponed or cancelled event, O-Seasons Events will not be responsible for covering airfare, accommodation, or other travel cost incurred by Clients. **4. Copyright:** All intellectual property rights in the materials distributed by O-Seasons Events in connection with this event are expressly reserved and any unauthorized duplication, publication or distribution is prohibited.

## Bank Details

**Name of account:** O-Seasons Events (PTY) LTD  
**Registration Number:** 2012/060287/07  
**Bank:** The Standard Bank of SA Ltd  
**Branch code:** 001255  
**Branch Name:** Rivonia  
**Account Number:** 370463854  
**Type of acc:** Business Cheque  
**Swift code:** SBZAJJ

## Conference Fees

Please select your venue by ticking the boxes below

Please select your options by ticking the boxes below

Conference and Workshop (5 days)

\$ 2,500

Airport Transfer (both ways)

\$ 100

Accommodation Per Night

\$ 110

Optional Tour

\$ 130

**South Africa Tel:** +27 11 549 5668 **Mobile:** +27 78 512 0481 |  
**Email:** [info@oseasonsevents.co.za](mailto:info@oseasonsevents.co.za) | **USA Tel:** +1 870-600-0641