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Performance Monitoring Indicators

M&E Part II

June 5, 2016
Padova Hotel – Sin El Fil



9:30 – 10:10

Opening Session, Introduction & Pre Test

10:10 – 11:15

Session I: Performance Indicators Basics

11:15 – 11:25

Coffee Break

11:25 – 12:30

Session II: Good Indicators & Indicators' Tools

12:30 – 1:00

Lunch Break

1:00 – 2:15

Session III: M&E Framework & PIRS: Practical Exercise

2:15 – 2:30

Closing Session, Post Tests, Training Evaluation

Performance Monitoring Indicators

M&E Part II

Trainer
Abeer Gazzawi

June 5, 2016
Padova Hotel – Sin El Fil



Opening Session: Objectives of Training Workshop

Opening Session



OPENING SESSION

- Introduction
- Training Workshop's Objectives
- Training Workshop Agenda
- Expected Learning Outcomes

Opening Session



Workshop Objectives

By the end of the training workshop, participants will:

- Understand the role performance indicators play in managing projects towards results;
- Acquire skills related to the development of S.M.A.R.T. indicators with baselines and targets;
- Learn how to complete and use “M&E Framework” and “Performance Indicator Reference Sheet (PIRS)”.

Opening Session



M&E Pictionary: Let's Play

- Training participants will be divided into two teams;
- Each team will select 5 members to participate in the game;
- Each participant will pick a card that includes a key M&E term. S/he has 1 minute to draw a sketch or picture which suggest the word printed on the card – watch the timer in the background!;
- The participant cannot use verbal clues about the subject s/he is drawing;
- Each team will try to guess the word the drawing is intended to represent;
- Each team will get to pick up to 5 cards. The team with most points (correct answers) wins the game!

Opening Session



Opening Session End

Opening Session



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Session I: Performance Indicators Basics

Session I



Session I Objectives

By the end of the first session, participants will:

- Know what an indicator is and how it can be used in improving the efficiency and effectiveness of projects;
- Understand the different levels of indicators and how they serve different purposes;
- Learn about indicators' selection cycle or process;
- Understand how performance indicators relate to project life cycle.

Session I



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What is an indicator?

An indicator is a M&E tool used to track, measure, evaluate and report on progress towards objectives at different levels including:

- (a) Activities;
- (b) Results; and
- (c) Goals.

Session I



What does an indicator measure?

An indicator measures progress and tracks change from baselines to targets.

A baseline is the value of a performance indicator before the implementation of a project.

A target is the specific, planned level of change to be achieved within a set timeframe after the implementation of the project is completed.



Indicators assist in:

- Tracking the implementation of activities to ensure they are: **(a)** carried out as planned; & **(b)** leading to the planned or intended **results**;
- Analyzing results to ensure they are: **(a)** taking place/unfolding as planned; & **(b)** leading to the planned or intended **goal(s)**;
- Monitoring progress towards final goals.

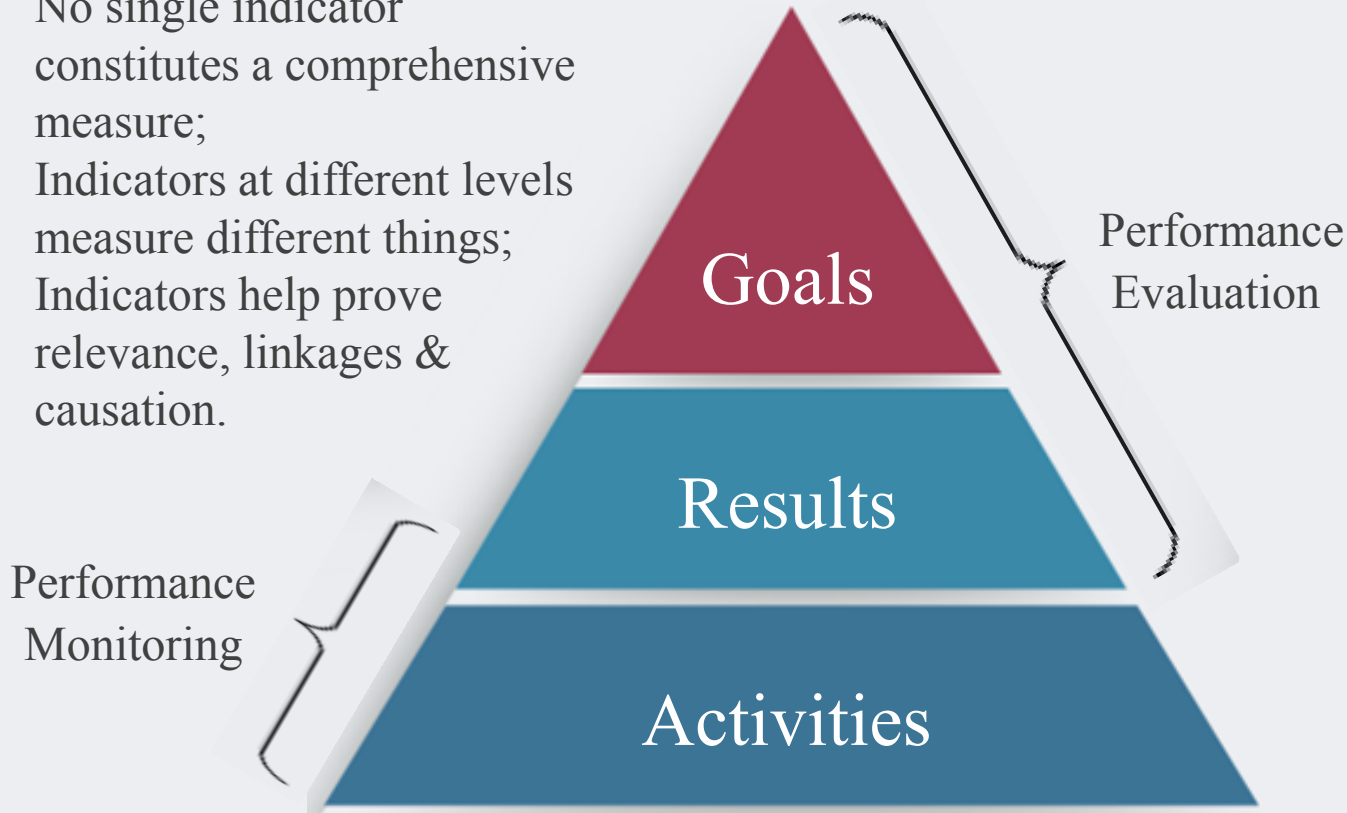


By using indicators, we can:

- Reduce a large amount of data down to its simplest form; thus, simplifying reporting;
- Identify weaknesses in a timely fashion, alerting management to any needed corrective action;
- Evaluate the effectiveness of program or project activities;
- Provide evidence as to whether results and goals are being achieved.



- No single indicator constitutes a comprehensive measure;
- Indicators at different levels measure different things;
- Indicators help prove relevance, linkages & causation.

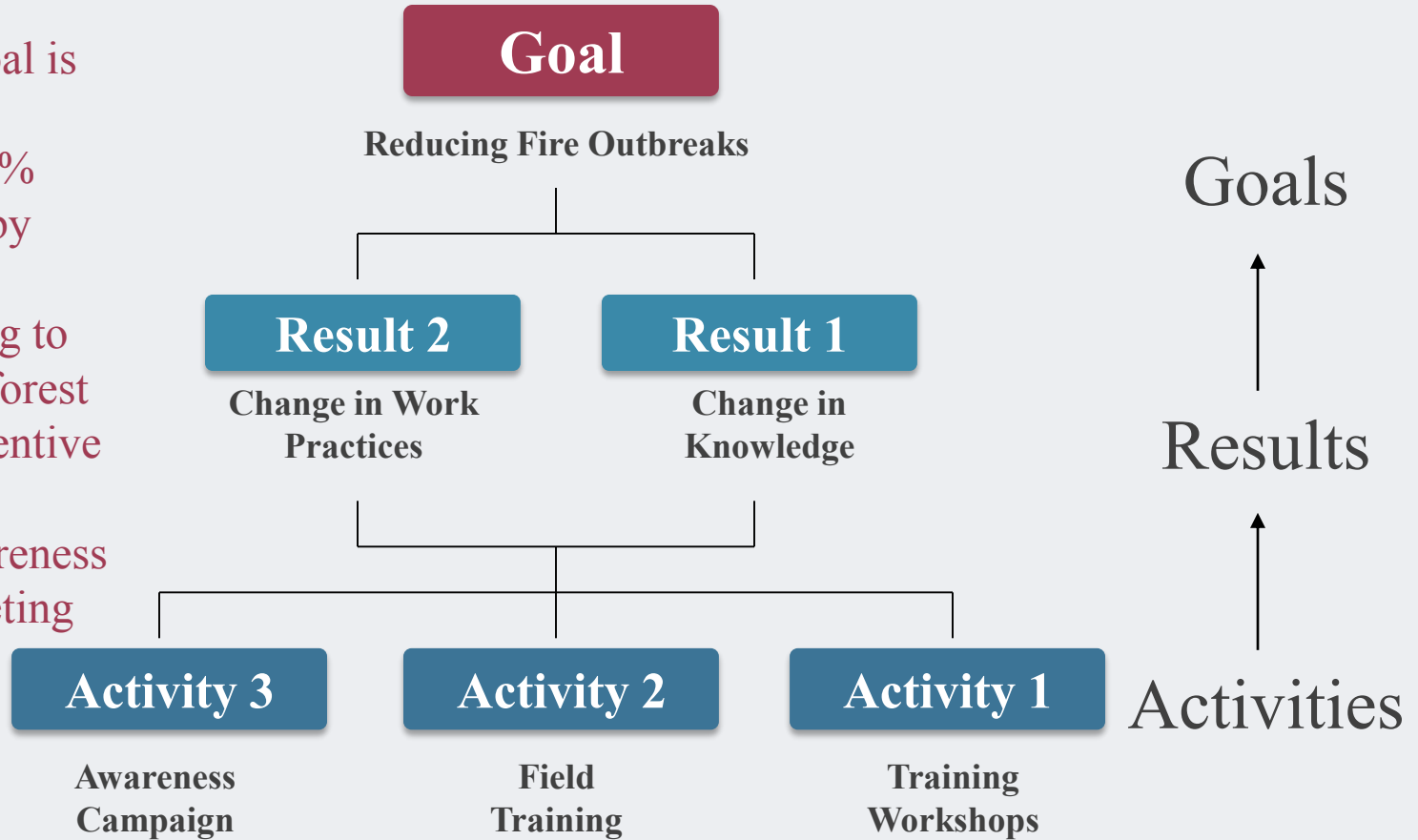


A high quality M&E system uses indicators that monitor progress and track change at all levels

Session I



The project's goal is to reduce fire outbreaks by 10% over two years by providing: (a) capacity building to volunteers and forest rangers on preventive techniques; (b) conducting awareness campaigns targeting residents



Session I



M&E Framework

Level	Focus Area	Indicator(s)	Baseline	Target	Sample Data Collection Tools
Goal	Reducing Fire Outbreaks	<ul style="list-style-type: none"> Percentage decrease in fire outbreaks in targeted area 	0%	10%	Fire Incident Reports
Result(s)	Change in Knowledge	<ul style="list-style-type: none"> Trainees knowledge of forest fire prevention techniques improved 	0%	60%	Pre & Post Tests
Output(s)	Kits	<ul style="list-style-type: none"> Number of training kits distributed during workshop to firefighters 	40	30	Kits Handover Log Sheet
Output(s)	Trainees	<ul style="list-style-type: none"> Number of volunteers trained Number of forest rangers trained Number of females trained 	5 0 2	20 30 15	Attendance Sheets
Activity	Training Workshops	<ul style="list-style-type: none"> Number of training workshops conducted 	0	2	Attendance Sheets

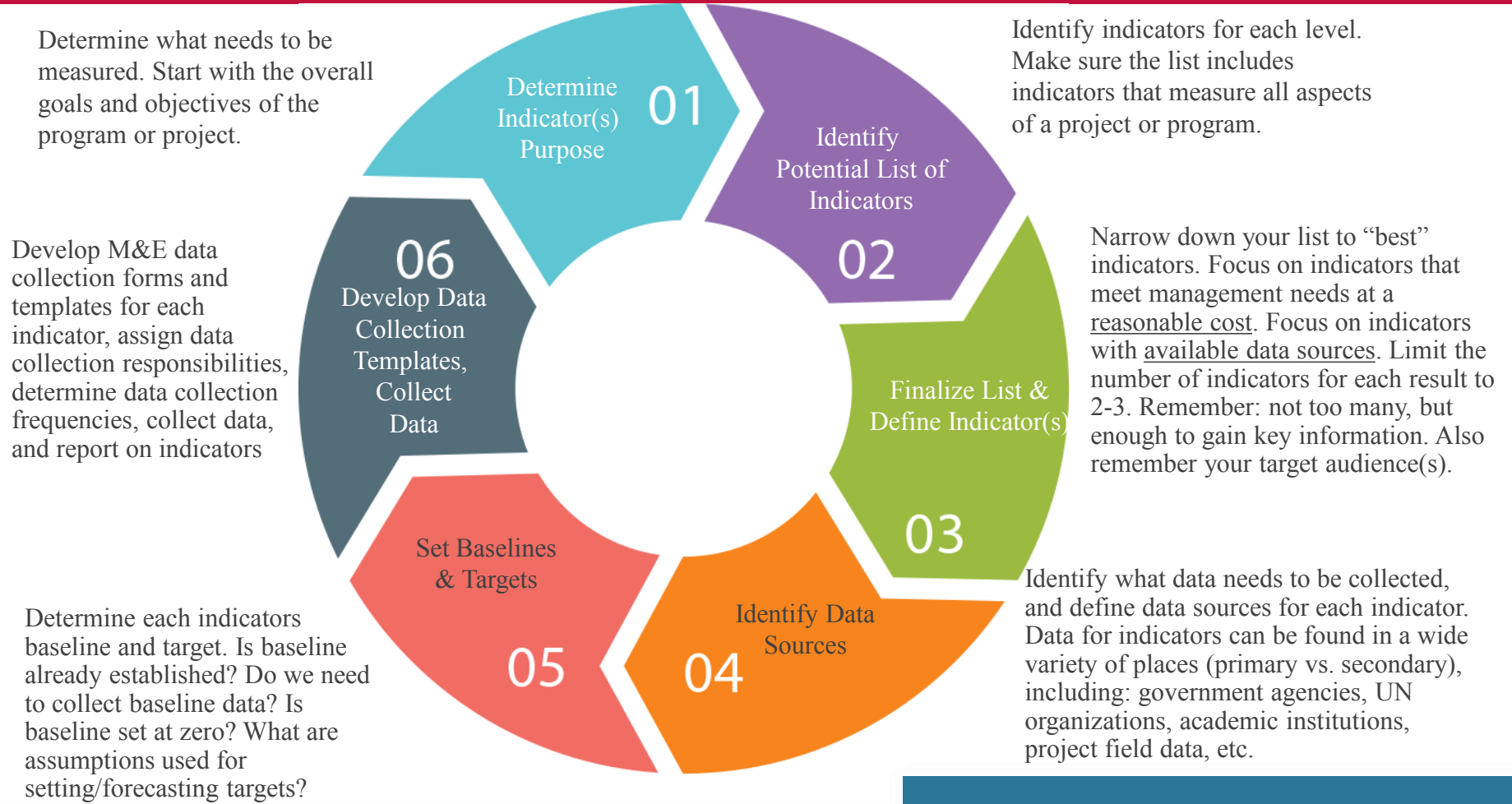
Session I

Sample Project



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Indicators'

Development Cycle

Session I



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Example 1

An NGO is implementing a two-year “waste reduction” project that aims at encouraging recycling of paper and cardboard waste. The NGO has set up collection points in ten (10) stores in Bhutan. The NGO has also reached a deal with one of country’s leading recycling factories (**Factory X**) for the processing of collected waste. The project’s goal is to reduce the amount of municipal solid waste (MSW) that makes it to landfills by 15%, which will help reduce landfill gas emissions by 3%.

Goal Level - Indicator Options:

Option 1: MSW landfilling in Bhutan decreased by 15% over two years

Option 2: MSW landfill gas emissions in Bhutan reduced by 3% in two years

Option 3: Amount of paper and cardboard waste recycled by **Factory X**

Which indicator do we use? Why?

Session I



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Example 2

An NGO is implementing a three-year educational project that aims at improving reading proficiency among Grades 5-6 students by at least 70% within 3 years. This improvement will allow for increasing the number of university graduates by 50% over 3 years. The NGO is planning on 2 summer camps per year, with each camp accommodating 30 Grades 5-6 students with low reading proficiency. The NGO is planning on distributing 180 “Read at Home Kits” to students participating in reading summer camps so that the parents of participating students can help them improve their reading while at home.

Goals: Increasing the number of university graduates by 50% in 3 years

Results: Reading proficiency among Grades 5-6 students participating in summer camps improved by at least 70% over three years

Outputs: Number of students participating in “reading” summer camps
Number of “Read at Home Kits” distributed during summer camps

Activities: Number of “reading” summer camps conducted over 3 years

Session I

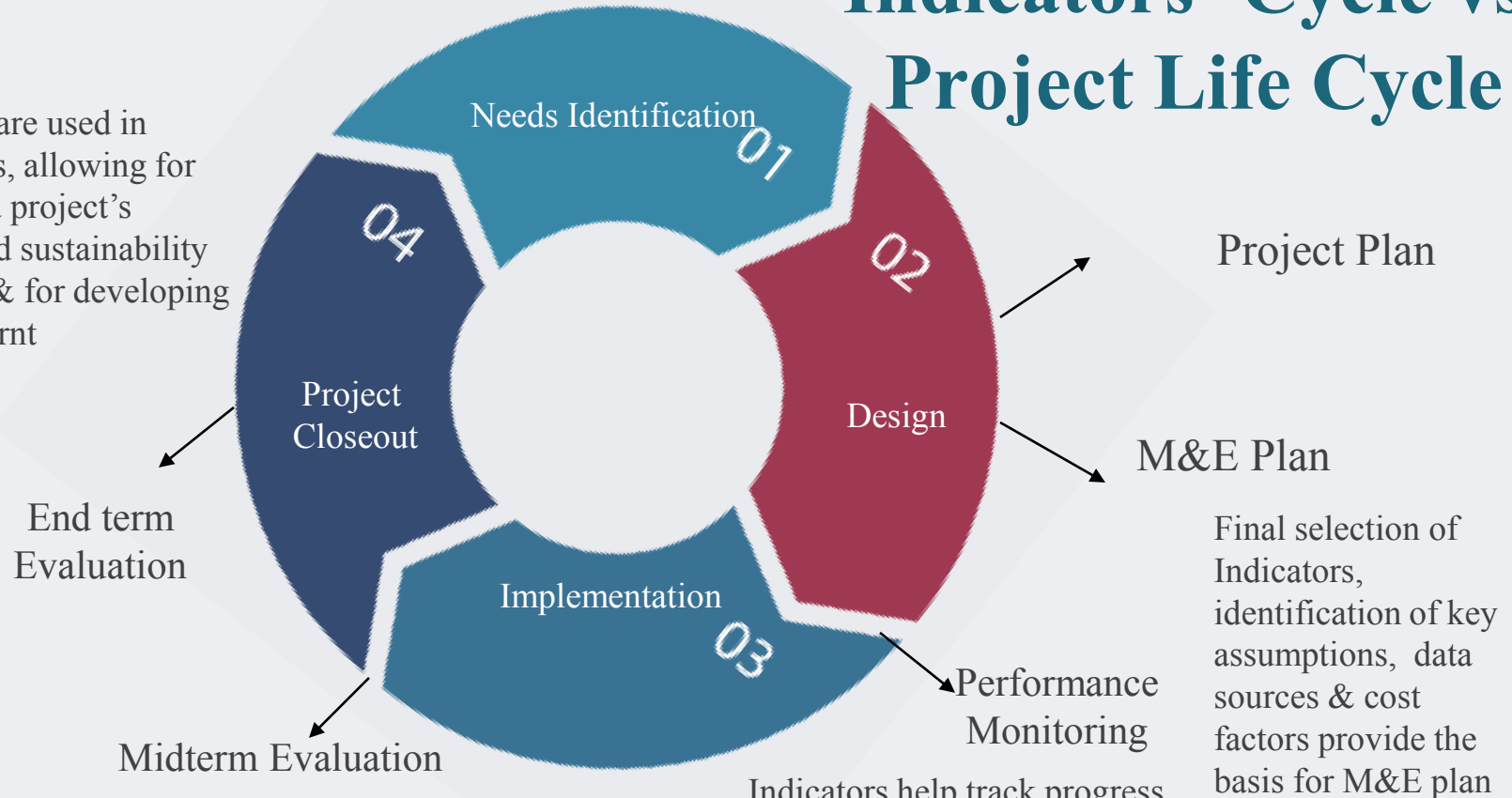
Indicators’

Development Cycle



Indicators' Cycle vs. Project Life Cycle

Indicators are used in evaluations, allowing for assessing a project's success and sustainability prospects & for developing lessons learnt



Project Plan

M&E Plan

Final selection of Indicators, identification of key assumptions, data sources & cost factors provide the basis for M&E plan

Indicators help track progress towards targets during implementation (budget, activity schedule, results), while helping in identification of necessary corrective action

Session I



Session I End

Session I



Coffee Break

Break Time!



Session II: Good Indicators & Indicators' Tools

Session II



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Session II Objectives

By the end of the second session, participants will:

- Become aware of common difficulties or challenges linked to the selection of performance indicators;
- Learn characteristics of a good indicator;
- Learn about M&E Framework & Performance Indicators Reference Sheets (PIRSs) as tools used for strengthening indicators and M&E reporting.

Session II



Exercise 1: Brainstorming

Training participants will be divided into three working groups. Each group will identify (based on experience):

1. Top 3-5 challenges encountered when selecting or developing indicators
2. Tools or techniques used to deal with these challenges

Each team will prepare a two bullet point lists citing: (a) challenges; (b) tools or solutions used to deal with these challenges.

Each team will select a member to present the list the team agrees on.



Indicator Selection Challenges

- Indicators fail to measure intended change at different levels of the project – activities, results & goals ;
- Indicators fail to show linkages & causation between activities, results and goals.
- Indicators are not:
 - ✓ **Meaningful:** They do not capture or report important information about the project.
 - ✓ **Direct:** They fail to closely measure intended change
 - ✓ **Objective:** Have no clear definition of what is being measured and what data needs to be collected and from which sources
 - ✓ **Reliable:** They are not consistently measured across time
 - ✓ **Understandable:** they are not easy to comprehend and interpret



Indicator Selection: Think S.M.A.R.T.

The desired properties of indicators will depend very much on the approach adopted and of the nature of the project. A widely used acronym to summarise characteristics of good indicators is “SMART”.

- **Specific**
- **Measurable** (and also *reliable, comparable* and *contextually appropriate*)
- **Achievable** (and also *cost effective*)
- **Relevant**
- **Time-bound** (and also *sensitive*)



Indicator Selection: Think S.M.A.R.T.

- S SPECIFIC** The indicators need to be clearly stated, well defined and focused. They should be clear to people with a basic knowledge of the project.
- M MEASURABLE** The indicator should be measurable, that is, it has the capacity to be counted, observed, analyzed, tested, or challenged. The indicators should be able to determine the degree of completion or change. Using the same methodology and information, findings should be repeatable and comparable.
- A ATTAINABLE** The target attached to the indicator should be achievable within the scopes of the project/ programme.
- R RELEVANT** The indicators should be able to detect change and be related to the specific situation they are “indicating” information about. They should be measurable at an appropriate scale.
- T TIME-BOUND** The indicator should be attached to a time frame. Term dates for measurement should be included.



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Example 1

An NGO is implementing a three-year educational project that aims at improving reading proficiency among Grades 5-6 students by at least 70% within 3 years. This improvement will allow for improving the students test scores in English by 50%

Goals: Results of English test scores of summer camp students improved by 50% over 3 years

Results: Reading proficiency among Grades 5-6 students participating in summer camps improved by at least 70% over three years

Outputs: Number of students participating in “reading” summer camps

Activities: Number of “reading” summer camps conducted over 3 years

Sample S.M.A.R.T.
Indicator

Session II



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Exercise 2: S.M.A.R.T. INDICATORS

Training participants will be divided into three working groups. Each group will review the list of indicators provided and determine whether they are:

1. Specific
2. Measurable
3. Achievable
4. Relevant
5. Time-bound

Each team will provide suggestions as to how these indicators can be improved. A guide for S.M.A.R.T. Indicators is included as handout with this exercise.

Session II



M&E Framework

M&E framework is a tool used to track progress towards targets across all indicators. It is a table that describes the indicators that are used to measure whether the program or project is succeeding in achieving its set targets. It includes a:

- List of indicators at all levels;
- Precise definition of each indicator;
- Per indicator baseline and target data;
- Information about: data sources, data collection methods, data collection frequency and data collection responsibilities.

In essence, M&E framework – or M&E Indicators Tracking Table – answers the following questions: Who, Why, When, What.



M&E Framework Template

مؤشر الأداء	التعريف	خط الاساس	الهدف	مصدر البيانات (وسائل التحقق)	وتيرة جمع البيانات	المسؤوليات
Performance Indicator	Definition	Baseline	Target	Data Source	Frequency of Data Collection	Responsibilities
الأثر (Impact/ Goal)						
(النتائج) (Outcome/ Results)						
النشاطات (Activities)						



M&E Framework Example

مؤشر الأداء	التعريف	خط الأساس	الهدف	مصدر البيانات (وسائل التحقق)	وتيرة جمع البيانات	المسؤوليات	
Performance Indicator	Definition	Baseline	Target	Data Source	Frequency of Data Collection	Responsibilities	
الأثر (Impact/ Goal) (النتائج) (Outcome/ Results)	Advocacy skills of trainees improved by at least 45%	The indicator will track and measure the change in skill level of trainees that have completed their training, using pre and post test scores	0%	45%	The indicator will use pre and post test scores recorded for trainees that have completed advocacy training workshops.	Rolling basis, submitting monthly M&E reports to management	M&E Officer will conduct the analysis after collecting the forms. /Workshop Trainer will prepare pre and post tests
النشاطات (Activities)							



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Performance Indicators Reference Sheets

Performance Indicators Reference Sheets (PIRSs) are a one-stop shot that includes all details related to any given indicator. Information is divided across 9 main sections:

1. PIRS Author & Date
2. Indicator Definition
3. Rational & Assumptions
4. Data Collection Method
5. Data Reporting
6. Data Quality Issues
7. Data Quality Review Process
8. Comments Recommendations
9. Changes Introduced to Indicator

Session II



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Performance Indicator Reference Sheet

الورقة المرجعية لمؤشرات الأداء

Date of PIRS

This PIRS prepared by:

Date of Last PIRS update:

تاريخ تطوير الورقة المرجعية لمؤشر الأداء

قام بتحضير الورقة المرجعية

آخر تاريخ للتحديث

Name of Indicator:

اسم المؤشر

PRECISE DEFINITION:

الشرح المفصل

RATIONALE & ASSUMPTIONS:

منطق المؤشر والافتراضات

Unit of measure:

وحدة القياس

Disaggregates:

مستوى تفصيل المؤشر

Indicator type:

نوع المؤشر

Expected direction of change:

اتجاه التغيير المتوقع (سلبى او إيجابى)

DATA COLLECTION METHODOLOGY

منهجية جمع البيانات

Data source: (Primary or Secondary)

مصدر البيانات

Level of collection:

مستوى جمع البيانات

Who collects data for this indicator:

من المسؤول عن جمع البيانات

How should it be collected:

كيف يجب جمع البيانات

Frequency of collection:

وتيرة جمع البيانات

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How is the baseline determined:

How are the targets set:

DATA REPORTING

Data format

Data analysis

Frequency of data reporting:

Presentation of data:

DATA QUALITY ISSUES

Known Data Limitations (if any):

Plans to Address Limitations:

Data security

Data storage

DATA QUALITY REVIEW PROCESSES

Data Quality Review Plan/ Process:

Data Quality Review Frequency:

Date of last DQA

COMMENTS/ RECOMMENDATIONS:

CHANGES TO INDICATOR:

كيف تم تحديد خط الأساس

كيف تم وضع هدف المؤشر (الكمي أو النوعي)

الإبلاغ عن البيانات

تنسيق البيانات

تحليل البيانات

وتيرة ابلاغ البيانات

كيفية عرض البيانات

جودة ونوعية البيانات

محدودية البيانات

خطة مواجهة محدودية البيانات

أمان البيانات

طريقة حفظ البيانات

آلية الحفاظ على جودة البيانات

خطة مراجعة جودة البيانات

وتيرة مراجعة جودة البيانات

آخر مراجعة تمت لضمان جودة البيانات

التوضيحات/التعليقات

التغييرات التي طرأت على المؤشر

Session II



Session II End

Session II



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Lunch Break

Break Time!



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Session III: M&E Framework & Performance Indicators Reference Sheets: Practical Exercise

Session III



Session III Objectives

By the end of the first session, participants will:

- Learn how to analyze a development project and identify indicators to measure each milestone;
- Learn how to fill and use M&E Framework & Performance Indicators Reference Sheets (PIRSs)

Session III



Exercise 3

Training participants will be divided into three working groups. After carefully reading the case study provided, each group has to do the following:

Phase I

1. Determine indicators needed for each level, with baselines and targets

Phase II

1. Complete M&E Framework for all identified indicators

Phase III

1. Complete PIRS for one indicator



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Project A

“Future Health” is implementing a two-year project in two districts in Bekaa governorate. The project’s objective is reduce child mortality by 15%. The will provide:

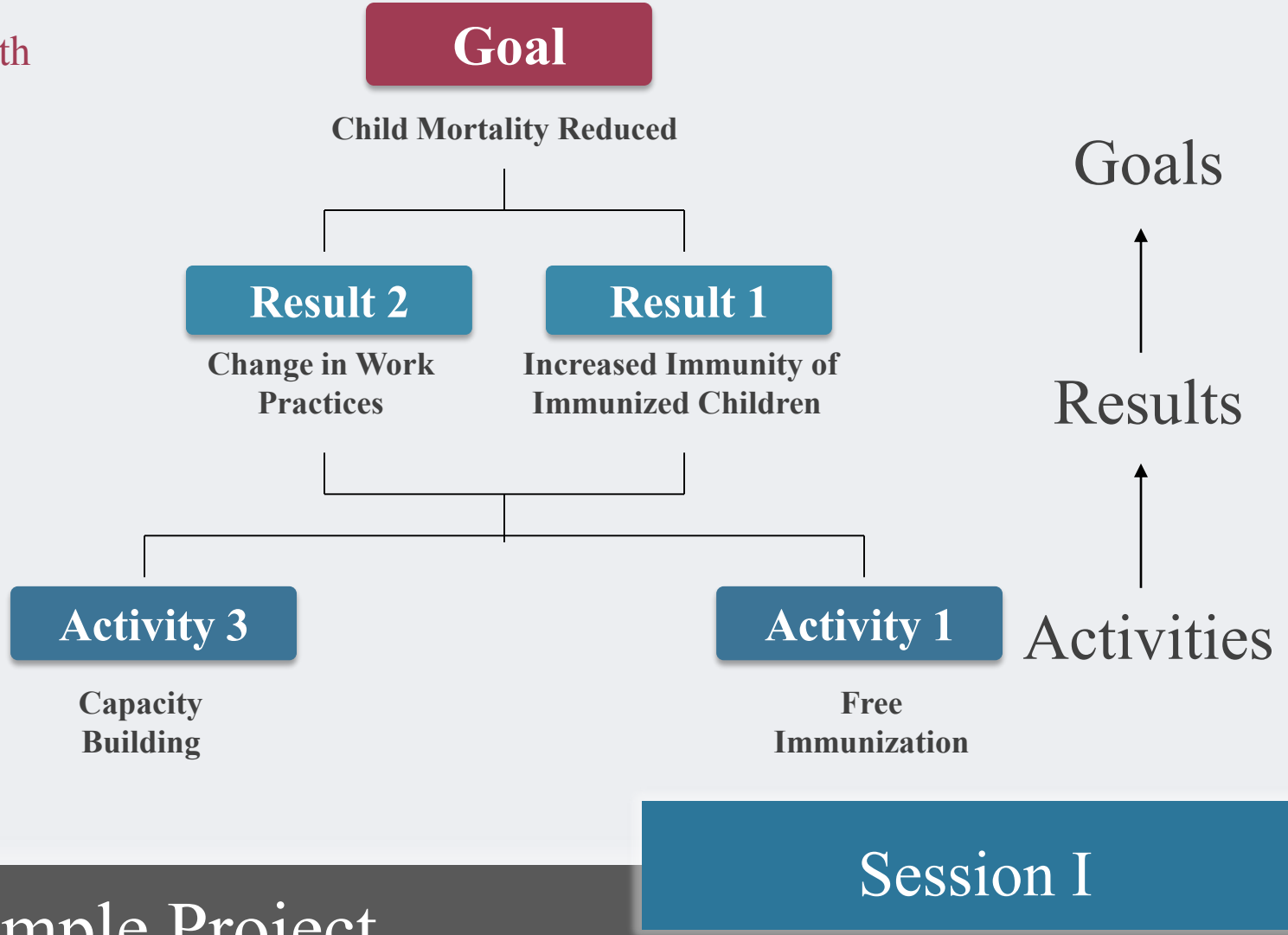
- “Free immunization” for children under the age of three (3);
- Capacity building and training for healthcare staff working at 13 of Ministry of Public Health-affiliated clinics in order to improve the quality of services provided by these clinics.

There are no hospitals or private clinics in the area(s) covered by the project, so residents rely entirely on services provided by public clinics. Total resident population in targeted districts is 150,000; children under the age of three (3) represent 20% of total population.

Session III



Future Health Project





M&E Framework Template

مؤشر الأداء	التعريف	خط الأساس	الهدف	مصدر البيانات (وسائل التحقق)	وتيرة جمع البيانات	المسؤوليات
Performance Indicator	Definition	Baseline	Target	Data Source	Frequency of Data Collection	Responsibilities
الأثر (Impact/ Goal)						
(النتائج) (Outcome/ Results)						
النشاطات (Activities)						



Performance Indicator Reference Sheet

الورقة المرجعية لمؤشرات الأداء

Date of PIRS

This PIRS prepared by:

Date of Last PIRS update:

تاريخ تطوير الورقة المرجعية لمؤشر الأداء

قام بتحضير الورقة المرجعية

آخر تاريخ للتحديث

Name of Indicator:

اسم المؤشر

PRECISE DEFINITION:

الشرح المفصل

RATIONALE & ASSUMPTIONS:

منطق المؤشر والافتراضات

Unit of measure:

وحدة القياس

Disaggregates:

مستوى تفصيل المؤشر

Indicator type:

نوع المؤشر

Expected direction of change:

اتجاه التغيير المتوقع (سلبى او إيجابى)

DATA COLLECTION METHODOLOGY

منهجية جمع البيانات

Data source: (Primary or Secondary)

مصدر البيانات

Level of collection:

مستوى جمع البيانات

Who collects data for this indicator:

من المسؤول عن جمع البيانات

How should it be collected:

كيف يجب جمع البيانات

Frequency of collection:

وتيرة جمع البيانات

Session II



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How is the baseline determined:

كيف تم تحديد خط الأساس

How are the targets set:

كيف تم وضع هدف المؤشر (الكمي أو النوعي)

DATA REPORTING

الإبلاغ عن البيانات

Data format

تنسيق البيانات

Data analysis

تحليل البيانات

Frequency of data reporting:

وتيرة ابلاغ البيانات

Presentation of data:

كيفية عرض البيانات

DATA QUALITY ISSUES

جودة ونوعية البيانات

Known Data Limitations (if any):

محدودية البيانات

Plans to Address Limitations:

خطة مواجهة محدودية البيانات

Data security

أمان البيانات

Data storage

طريقة حفظ البيانات

DATA QUALITY REVIEW PROCESSES

آلية الحفاظ على جودة البيانات

Data Quality Review Plan/ Process:

خطة مراجعة جودة البيانات

Data Quality Review Frequency:

وتيرة مراجعة جودة البيانات

Date of last DQA

آخر مراجعة تمت لضمان جودة البيانات

COMMENTS/ RECOMMENDATIONS:

التوضيحات/التعليقات

CHANGES TO INDICATOR:

التغييرات التي طرأت على المؤشر

Session II



End of Session III

الجلسة الرابعة



THANK YOU!



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