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Performance Monitoring Indicators

Monitoring and Evaluation - Part 4

23th of March 2018
Padova Hotel - Sin El Fil

Trainer
Dr. Fares Al Zain

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9:30-10:00

Opening session, introduction and preliminary test

10:00-11:15

First Session : Performance Indicators Foundations

11:15-11:30

Break

11:30-13:00

Second Session: Good indicators and indicators' tools

13:00-14:00

Lunch break

14:00-15:00

**Third Session: The Monitoring and Evaluation Framework,
and The Performance Indicator Reference Sheet**

15:00-15:30

Final Session, final exams, training evaluation

Performance Monitoring
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Opening Session: Training Workshop Objectives

Opening Session



Opening Session:

- **Introduction**
- Training Workshops Objectives
- Training Workshops Agenda
- Expected learning outcomes



Opening Session:

- Introduction
- **Training Workshops Objectives**
- Training Workshops Agenda
- Expected learning outcomes

Opening Session



Objectives of the Workshop

Upon completion of the workshop, participants will be able to:

- Understand the role played by the performance indicators in Project Management to achieve results;
- Acquire skills related to the development of smart indicators (specific, measurable, achievable, important indicators, and within a time frame) with the foundations and objectives lines.
- Learn how to complete and use the Performance Indicator Benchmark.



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First Session: Performance Indicators Foundations

First Session



What is an indicator?

An indicator is a monitoring and evaluation tool used to track, measure, assess and report on the progress made towards the targets achievement at various levels, including:

- (a) Activities
- (b) Results
- (c) Objectives



What does the indicator measure?

- The indicator measures the progress and follows up with the change from the foundations up to the objectives.
- The base is the performance indicator's value before the implementation of the project.
- The objective is a specified and planned level of change to be achieved in a specific time period after completion of the project.



Indicators help in:

- Track the implementation of activities to ensure that: (a) they are implemented as planned; and (b) they lead to the planned or intended results.
- Analyze the results to ensure that they: (a) occur / revealed as planned; and (b) that they lead to the planned or intended goal(s)
- Monitoring progress made towards achieving the ultimate objectives.



Through the use of indicators we can:

- Reduce a large amount of data down to its simplest form; thus streamlining the reporting process.
- Identify weaknesses in a timely manner and alert the Management to take any corrective action required.
- Evaluate the effectiveness of the program or project's activities.
- Provide evidence of achieving results and objectives.

- No single indicator is a considered a comprehensive measure.
- Indicators measure different things on different levels.
- Indicators help prove connections, links and causal relationship.

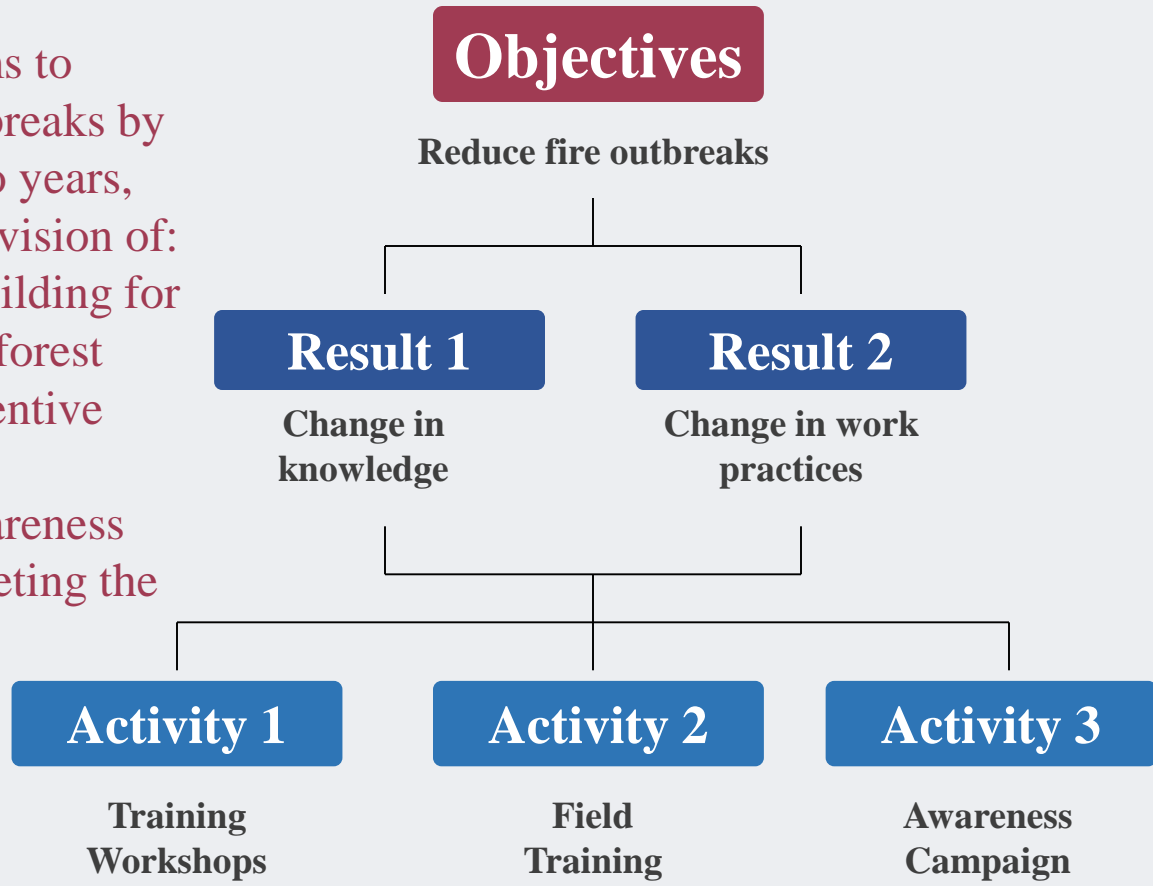


A high-quality monitoring and evaluation system uses indicators that monitor progress and track change at all levels

First Session



The project aims to reduce fire outbreaks by 10% within two years, through the provision of: (a) Capacity-building for volunteers and forest guards on preventive techniques; (b) Organizing awareness campaigns targeting the population.



Objectives



Results



Activities

First Session



Monitoring and Evaluation Framework

Typical data collection tools	Target	Baseline	Indicator(s)	Focus Area	Level
Fire incidents reports	10%	0%	<ul style="list-style-type: none"> Low fire rate in the targeted zones 	Reduce fire outbreaks	Objective
Preliminary & final tests	60%	0%	<ul style="list-style-type: none"> Improve trainee's knowledge of forest fire preventive techniques 	Change in knowledge	Result(s)
A sheet of the record delivery sets	30	40	<ul style="list-style-type: none"> Number of training tools distributed during the workshop to firefighters 	Tools	Inputs
Attendance sheets	20 30 15	5 0 2	<ul style="list-style-type: none"> Number of trained volunteers Number of trained forest guards Number of trained females 	Trainees	Inputs
Attendance sheets	2	0	<ul style="list-style-type: none"> Number of the conducted training workshops 	Training workshops	Activity

First Session

Project Sample



Sample 1

The Non-governmental Organization (NGO) has implemented the "waste reduction" project for two years, which aims to encourage the recycling of paper and cardboard waste. The NGO has set up collection points in ten (10) stores in Bhutan. The Non-governmental Organizations have also reached an agreement with one of the country's leading recycling plants (plant X) to process the collected waste. The project aims to reduce the amount of municipal solid waste that reaches the landfills by 15%, which will help in reducing the methane emissions by 3%.

Target Level – Indicators Options:

Option 1: The municipal solid waste landfills in Bhutan is reduced by 15% within two years

Option 2: Methane emissions from the municipal solid waste in Bhutan are reduced by 3% within two years

Option 3: The amount of paper and cardboard waste recycled by plant X



Sample 2

A Non-governmental Organization is implementing a three-year educational project aiming to improve the reading skills among average fifth and sixth graders by at least 70% within 3 years. This improvement allows the number of university graduates to increase by 50% within three years. The NGO plans to organize two summer camps each year, and each camp accommodates 30 students in the fifth and sixth grades with low reading skills. The concerned Non-governmental Organizations are planning to distribute 180 “Home Reading Tools” to the students participating in summer reading camps so that students’ parents can help in improving their reading at home.

Objectives: Increase the number of university graduates by 50% in 3 years

Results: Reading skill has improved among the average fifth and sixth graders, participating in summer camps by at least 70% over 3 years

Outputs: The number of students participating in summer reading camps and the number of “home reading tools” distributed during summer camps

Activities: The number of “reading” summer camps conducted over more than 3 years



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End of the First Session

First Session



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Break

It's time to have a break !



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Second Session: Good Indicators and Indicators' Tools

Second Session



Objectives of the Second Session

At the end of the second session, participants will be able to:

- Identify the common difficulties or challenges associated with the selection of performance indicators;
- Learn the good indicator characteristics.



Indicators

- A feature that can be observed or measured, which clarifies or indicates the extent reached by the achievement of a result intended to be achieved.
- A scale used to show the change in a situation, progress, or outcomes of an activity or project.
- Performance indicators answer the question “How will we know when we see its achievement”
- Objectives, results, and activities are developed after agreeing on the intervention logic .
- The indicator is a necessary tool for monitoring and evaluation.



Types of Indicators

- **Quantitative:** Number, quantity, ratio, relativity, average rate, classification.
- **Qualitative:** Description of the status quo to achieve the objective, documented observations, description of the situation, opinions of the evaluators, images.
- **Binary indicator:** Yes \ No
- **Indirect Proxy Indicators:** If direct indicators are not possible, you can refer to indirect indicators, for example, to measure the increase in the percentage of household income, we can refer to a number of indirect indicators, such as increasing of the cell phone bills.

Examples?





Good Indicator Criteria

- **Determined:** It determines the results in terms of their quantitative and qualitative aspects, the geographical location and the targeted group, for example: the number or proportion of female youth in the Cairo governorate who issued election cards.
- **Appropriate and Measurable:** Directly relevant to project objectives, and technically appropriate: The indicator must be measurable if it is quantitative.

Does the indicator show the desired change in the project / activity?

How can we measure the indicator?



Good Indicator Criteria

- **Objectivity:** It can be estimated / measured without personal estimates

Is the indicator considered objective and takes into account external (illegal) factors that may affect the results' achievement?

Is the indicator agreed upon by all parties?

- **Potentiality:** Project personnel can understand it and use the data collected through this indicator to make a decision to verify or modify the project performance

Does this indicator reflect the expected successes on the targeted group?

Good Indicator Criteria

When selecting indicators, one must consider:

- 1- The cost
- 2- The effort exerted to collect and analyze the data required for this indicator

Performance indicators are applied at all levels in the project's logical framework.





Examples of the indicators results

Results	Proposed indicators
<ul style="list-style-type: none">▪ Improvement of the prevailing health conditions of the residents in the area	<ul style="list-style-type: none">▪ Child mortality rate (under one year of age - under the age of five)▪ Proportion of population expected to survive until the age of 40▪ Average number of children's absence days from school for sickness reasons▪ Life expectancy at birth (male / female)▪ The average number of times in which people go to the health unit for sickness reasons▪ Proportion of infants born underweight▪ Maternal mortality rate (maternal mortality)



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End of the Second Session

First Session



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Lunch break

It's time to have a break !



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Third Session

Verification Methods, Baseline, Target Data,
Monitoring and Evaluation Framework

Third Session



Verification Methods, Objective, and Baseline

- **Verification Methods:** Describe the specific sources through which all indicators can be established in the logical framework

Main Sources: Follow-up visits / follow-up reports, database (beneficiaries), follow-up forms

Secondary sources: Secondary data, statistics, studies

- **Baseline Data** provide a base to measure change over time in performance indicators
- **Objectives:** Whereas the “Objective” plans exactly the figure / mark that the project intends to achieve in performance indicators



Verification Methods

The verification sources consist of statistics, reports, surveys, records, studies, visits that enable us to identify the access sources to the necessary data to verify the indicator.

Questions that help identifying the verification sources are as follows:

- 1) Are there adequate sources? (Statistics, reports, previews ...)
- 2) To what extent can we trust the available sources?
- 3) Is it possible to access (use) the relevant sources?
- 4) Is it necessary to create new sources and collect additional data? (At what cost?)

Note: In case there is no source to verify the indicator, this indicator must be changed.



Monitoring and Evaluation Framework

The monitoring and evaluation framework is a tool used to track progress towards achieving the objectives across all indicators. It is also a table that describes indicators used to measure the success of a program or project in achieving its objectives and plans. It includes:

- List of indicators at all levels
- Accurate definition of each indicator
- A combination of indicator baseline and targeted data
- Information on: data sources, methods of data collection, frequency of data collection and data collection responsibilities
- Basically, the monitoring and evaluation framework tracking schedule answers the following questions: who, why, when, what



Monitoring and Evaluation Framework Model

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)						
المخرجات Outputs						

A Sample of a Monitoring and Evaluation Framework

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)	The trainees' advocacy skills have improved by at least 45%	The indicator tracks and measures the change in the skill level of trainees who completed their training, using preliminary and final test results	0%	45%	The indicator will use the preliminary and final tests results, which are recorded for the trainees who have completed the training workshops in the advocacy field	Submission of monthly monitoring and evaluation reports to the Management on a regular basis	The Monitoring and Evaluation Officer will conduct an analysis after collecting the forms, but the workshop trainer will prepare introductory and preliminary tests.
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المخرجات Outputs



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Performance Indicator Reference Sheet



Performance Indicator Reference Sheet

The reference document that lists all data, information and assumptions related to performance indicators, including:

- Definition of the indicator and how to calculate it;
- Quantitative or qualitative objective;
- Relevance of the indicator to the logical framework and the intended impact;
- Baseline
- Measurement Unit



Performance Indicator Reference Sheet

- Data disaggregation, tabulation and classification level (by gender, age, or other category)
- Data source
- The data collection and analysis method and the frequency of its collection or update
- Data quality limitations or constraints
- Data quality assurance plan
- Any changes to the reference data are an indication over time



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Components of the Performance Indicator Reference Sheet

Date of PIRS	تاريخ تطوير الورقة المرجعية لمؤشر الأداء
This PIRS prepared by:	قام بتحضير الورقة المرجعية
Date of Last PIRS update:	آخر تاريخ للتحديث
Indicator Name:	اسم المؤشر
PRECISE DEFINITION:	تعريف المؤشر
RATIONALE& ASSUMPTIONS:	منطق المؤشر والافتراضات
Measurement Unit :	وحدة القياس
Disaggregation Level:	مستوى تفصيل المؤشر
Indicator type:	نوع المؤشر
Expected Change Direction (Negative or Positive):	اتجاه التغيير المتوقع (سلبى او إيجابي)
DATA COLLECTION METHODOLOGY	منهجية جمع البيانات
Data source: (Primary or Secondary)	مصدر البيانات
Data Collection Level:	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:	كيف تم تحديد خط الأساس
How are the targets set (quantitative or qualitative):	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 تمّت لضمان جودة البيانات
COMMENTS/ RECOMMENDATIONS:	التوضيحات/التعليقات
CHANGES TO INDICATOR:	التغييرات التي طرأت على المؤشر



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End of the Forth Session

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Thank you !



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