MONITORING, EVALUATION RESEARCH & LEARNING

Toolkit & Handbook

LEAP AFRICA

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WHO WE ARE AND WHAT WE DO

LEAP Africa is a leadership development non-profit organization with a mission to inspire and empower African youth by developing capacity and providing resources for transformative personal, organizational, and community leadership. The organization is tackling issues of leadership dearth, employability skills gap, corruption, enterprise and social good.

LEAP Africa interventions seek to bridge the gap in education and empower youths to have increased participation in issues affecting them and the society. This includes, demanding accountability for good governance or scaling innovative solutions. Since 2002, when the organization was founded, it has worked with local and international partners to equip over 80, 000 youth, teachers, youth-focused CSOs, social entrepreneurs and businesses to lead ethically and for them to implement initiatives that transform communities; institutionalize organizations and contribute to national development across 42 African countries.

The core focus of the organization is reflected in its vision that extends to Africa, which is "An inclusive and thriving Africa built through dynamic, innovative and ethical youth leaders." LEAP Africa is using a collective approach in addressing the crisis of leadership in Africa by facilitating value-driven leadership starting with the individuals and influencing their circles.

This toolkit and handbook seeks to provide guidance on the processes, templates, and tools essential for MERL activities. It serves as a valuable resource for individuals and organizations engaged in designing monitoring systems, offering MERL advice, collecting data, conducting evaluations, and enhancing overall program effectiveness. Whether you are a seasoned professional or new to the field, this guide will serve as a useful tool to make informed decisions and drive impactful outcomes in your MERL initiatives.

CONTENTS

KEY ABBREVIATIONS

CBO	Community-Based Organization
CBS	Community-Based Services
FGD	Focus Group Discussion
HNI	High Net-worth Individuals
KIS	Knowledge and Information Systems
KM	Knowledge Management
KPI	Key Performance Index
LEAP	Leadership, Effectiveness, Accountability and Professionalism
MERL	Monitoring, Evaluation, Research and Learning
MOE	Ministry of Education
MTR	Mid-Term Review
MYFF	Multi-Year Funding Framework
NGO	Non-Governmental Organization
OL	Organizational Learning
OLE	Organizational Learning and Evaluation
TOR	Terms of Reference

Monitoring, Evaluation, Research and Learning

THE BASICS OF MONITORING, EVALUATION RESEARCH AND LEARNING (MERL)

SECTION 1

1.1. MONITORING

Monitoring can be defined as the systematic process of collecting and recording information about project implementation and tracking progress towards expected results. It is the continuous and systematic observation and recording of programme progress. This is measured by regularly examining targets on the basis of indicators and assessing programmes from the perspective of key stakeholders.

1.2. EVALUATION

This is understood as the systematic assessment of the design, implementation and/or results of a programme, project, activity, policy, strategy or other undertaking. The intention of evaluation is to provide credible and useful information with a view to determine the worth or significance of an undertaking, incorporate lessons learned into decision-making and enhance the overall quality of a programme and its operations. The findings, conclusions and recommendations obtained must be verifiable and based on qualitative and/or quantitative data. Evaluation may take place while a programme is under way or after its conclusion.

1.3. RESEARCH

Research can be defined as the systematic and objective collection, analysis, and interpretation of data to answer specific questions or solve problems, leading to the development of new knowledge, theories, or practices. Within the developmental sector and social science, research often involves the systematic investigation of social issues, behaviours, and policies to generate knowledge that can inform solutions and

drive positive change. Research has become a key component of robust monitoring and evaluation (M&E) systems in contemporary practice. While evaluation is often used to assess the impact of an implemented project, research complements this by providing deeper insights into the underlying factors, processes, and mechanisms that contribute to or hinder success. Research helps to identify best practices, inform program design, and guide strategic adjustments. It enables M&E systems to move beyond mere assessment to a more comprehensive understanding that supports continuous learning and improvement.

1.4. LEARNING

Learning is the process by which knowledge and experience directly influence changes in behaviour. The true value of monitoring, evaluation, and research lies in providing insights to inform decision-making and drive positive change. If the information provided by monitoring, evaluation and research is not useable, the exercise could be regarded as futile. An important task for a MERL department or professional is to ensure that information is presented in a way that makes it accessible to those who need it to make decisions. Monitoring, evaluation and research will be ineffective if they do not lead to learning at the project level. Evaluation and research findings, recommendations and learning should also contribute to improved programs, policies and practices, evidence-based advocacy and effective resource mobilization.

1.5. The need for monitoring, evaluation, research and learning

MERL is essentially useful for the following purposes;

- **Establishing baselines and contextual understanding**: MERL conducts baseline studies and needs assessments to establish initial conditions and contextual understanding, providing a reference point for assessing program impact and identifying priority areas.
- **Informing program design and implementation**: MERL conducts formative research and pilot studies to identify what works, what doesn't, and why. These findings serve as evidence-based insights for designing effective programs and interventions.
- **Quality assurance and improvement**: MERL findings play a crucial role in assuring and improving the quality and effectiveness of projects and programs. By systematically collecting and analyzing data, MERL identifies strengths and areas for

improvement, enabling continuous refinement of strategies and practices. This leads to more effective and efficient programs that better meet the needs of stakeholders.

- **Learning and adaptability**: MERL findings could be employed to support a culture of continuous improvement and adaptability on a program and within an organization.
- **Steering**: Evidence and results collected by a MERL professional or department can contribute to steering decisions at all levels, from individual programmes to management and steering bodies. MERL therefore lays the foundation for operational, strategic and management decisions.
- **Reporting and accountability**: MERL serves as a medium through which organizations could account for their work to their funders, partners, and the general public. Accountability in this sense also includes reporting on the results that have been achieved.
- **Influencing policy and practice**: MERL findings and recommendations can influence policy and practice by providing evidence that supports advocacy efforts and informs decision-making at higher levels. This can lead to broader systemic changes and improvements.
- **Fundraising**: MERL plays a crucial role in fostering relationships with existing and developing new relationships with potential funders. MERL strengthens an organization's implementation capacities and competitiveness.

1.6. Good practices in monitoring, evaluation, research and learning

Some key principles that could guide MERL activities and practices are highlighted as follows. While these principles are presented in the context of monitoring and evaluation activities, they are equally applicable to research activities.

- **Independence**: Evaluation teams should be independent from the delivery and management of projects. They should not personally have been engaged in the activities to be evaluated or have been responsible in the past for the design, implementation, or supervision of the project or program to be evaluated. For evaluations conducted under the authority of project managers, it is often necessary to have independent review mechanisms to help ensure impartiality and rigor.

- **Credibility**: Monitoring and evaluation should be credible and based on reliable data or observations. This implies that monitoring and evaluation reports should reflect consistency and dependability in data, findings, judgments, and lessons learned, with reference to the quality of the instruments, procedures, and analysis used to collect

and interpret information. Monitoring and evaluation at the project, program, and portfolio levels should use, as much as possible, dynamic and pragmatic techniques and indicators to measure results and progress.

- **Utility**: Monitoring and evaluation should serve the information needs of intended users. Partners, evaluators, and units commissioning evaluations should endeavour to ensure that the work is well informed, relevant, and timely, and that it is clearly and concisely presented so as to be of maximum benefit to stakeholders. Monitoring and evaluation reports should present evidence, findings, issues, conclusions, and recommendations in a complete and balanced way. They should be both results and action oriented.
- **Impartiality**: The principle of absence of bias applies to self-evaluations, self-assessments, internal reviews and reports, and monitoring actions. Monitoring and evaluations must give a comprehensive and balanced presentation of the strengths and weaknesses of the policy, program, project, or organizational unit being evaluated. An evaluation process should reflect impartiality at all stages and take into account the views of all stakeholders. An evaluation unit should endeavour to ensure that the evaluators selected are impartial and unbiased.
- **Transparency**: Transparency and consultation with the major stakeholders are essential features in all stages of monitoring and evaluation processes. This involves clear communication concerning decisions for the programme and areas for evaluation, the purpose of the evaluation, the criteria applied, and the intended use of the findings. Documentation resulting from monitoring and evaluation activities should be in an easily consultable and readable form so as to also contribute to transparency and legitimacy. Monitoring and evaluation reports should provide transparent information on sources, methodologies, and approach.
- **Disclosure**: The lessons from monitoring and evaluation should be disseminated in accordance with widely accepted international standards by establishing effective feedback loops to operational staff, beneficiaries, evaluation committee, funders and the general public. Having a clear disclosure policy ensures transparent dissemination of monitoring and evaluation findings through various channels like websites, knowledge products and events.
- **Respect**: Evaluations should show respect or regard to the welfare, beliefs, and customs of beneficiaries as well as issues related to conflict of interest. Evaluators must respect the right of institutions and individuals to provide information in

confidence. If evidence of wrongdoing is uncovered, the evaluator or manager shall report such cases discreetly to the evaluations committee, who will take appropriate action. Ethical evaluation requires that management and/or commissioners of evaluations remain open to the findings and do not allow vested interests to interfere with the evaluation.

- **Participation**: Most programme's activities are implemented through various partnerships of development partners and national or nongovernmental entities, as well as bilateral donors, therefore monitoring and evaluation activities should be carried out with the participation of relevant internal and external stakeholders. Having a joint or an independent external evaluator on a project can provide a more comprehensive assessment by incorporating diverse perspectives and uncovering insights and feedback that may not be captured through a single, stand-alone evaluation.
- **Competencies and capacities:** Depending on the subject, an evaluation unit requires a range of expertise that may be technical, environmental, or within social science field or the evaluation profession. To ensure comprehensive assessments, organizations should engage independent-minded and experienced evaluators and implement rigorous methodologies. Utilizing local expertise is essential for evaluations, and efforts should be made to promote evaluation capacity development at the local level, with a specific emphasis on environmental evaluation concerns.
- **Data quality assurance**: MERL activities and processes should ensure data accuracy, reliability, and validity through rigorous quality assurance measures. This includes proper training for data collectors, regular data audits, and standardized data collection tools.
- **Ethical considerations**: Ethical standards should be upheld throughout MERL activities and processes. This includes obtaining informed consent from participants, ensuring confidentiality, and being transparent about the purpose and use of the data collected.

Differences between Monitoring and Evaluation

Monitoring	Evaluation
• Monitoring is a routine activity of scrutinizing the activities carried out in a project and also states the shortcoming that was experienced in the course of the project.	• Evaluation is a periodic activity that draws up conclusion of the importance and the effectiveness of a project.
• Monitoring is termed as an observation activity.	• Evaluation is termed as a judgmental activity.
• Monitoring is a short-term process that entails the collection of vital information that is related to the success of the project.	• Evaluation is a long-term process which entails data capturing, detailed documentation of records and analysing the outcome and impact of the project.
• Monitoring focuses on the general improvement of an on-going project by eliminating hindrances and ensuring efficient delivery all through the project	• Evaluation focuses on the general outcome of the project, the sustainability of the project and the impact comparing to the set standard declared at the beginning the project.

Table 1: Differences between Monitoring and Evaluation

Differences between Research and Evaluation

Research	Evaluation
Purpose: Aims to generate new knowledge, test theories, and contribute to the understanding of a particular phenomenon or problem.	Aims to assess the merit, worth, and significance of a program, project, or intervention to inform decision-making and improve its effectiveness.
Focus: Focuses on answering specific research questions or testing hypotheses to advance knowledge in a particular field.	Focuses on assessing the implementation, outcomes, and impact of a program or intervention in relation to its objectives, outcomes and stakeholder needs.
Outcome: The production of new knowledge, theories, or insights that contribute to the broader scientific or academic community.	Actionable findings and recommendations that inform decision-making, program improvements, and accountability to stakeholders.
Generalizability: Research often aims to generate findings that are generalizable to a broader population or context beyond the specific study sample.	Evaluation findings are typically specific to the program or intervention being evaluated and may not be directly generalizable to other contexts.
Timeframe: Can be a longer process, often driven by the researcher's agenda and not necessarily tied to a specific program or intervention timeline.	Typically linked to the timeline of a program or intervention, with evaluations conducted at specific points (e.g., baseline, mid-term, final) to assess progress and outcomes.
Stakeholder involvement: May be limited, with researchers having more control over the study design and implementation.	Stakeholder engagement is crucial in the evaluation cycle, as evaluations are conducted to meet the information needs of program staff, funders, beneficiaries, and other stakeholders.

Table 2: Differences between Research and Evaluation

1.7. Monitoring and evaluation systems

There are various systems and approaches used for monitoring and evaluation. These approaches vary in complexity, methodology, and scope, but they all share the common goal of providing actionable insights to enhance performance and achieve desired outcomes. Each of these approaches has its own strengths and limitations and can be adapted to specific contexts, objectives, and stakeholders. Some of these approaches are as follows.

M&E system	Key features	Key functionality
Results-Based Monitoring and Evaluation (RBM&E)	Focuses on achieving desired results and outcomes through systematic planning, monitoring, and evaluation. Emphasizes setting clear and measurable goals, aligning activities with objectives, and using performance data to inform decision-making.	Establishes performance indicators linked to desired results, tracks progress against targets, and assesses the extent to which objectives are being achieved. Emphasizes the use of quantitative data and performance metrics to measure success.
Logical Framework Approach (LFA)	Provides a structured framework for planning, implementing, monitoring, and evaluating projects. Defines objectives, inputs, outputs, outcomes, and indicators to clarify project goals, identify risks, and establish metrics for measurement.	Helps stakeholders articulate project goals and objectives, identify causal relationships between inputs and outcomes, and develop indicators to measure progress. Facilitates systematic monitoring and evaluation through a logical and transparent framework.
Theory of Change	A comprehensive approach that outlines the sequence of actions and outcomes necessary to achieve long-term goals. Focuses on understanding the underlying assumptions and pathways of change that drive interventions.	Helps stakeholders articulate the logic behind interventions, identify key assumptions, and map out the intermediate steps needed to achieve desired outcomes. Guides the design of M&E systems by highlighting critical junctures for intervention and potential areas of impact.
Participatory Monitoring and Evaluation (PM&E)	Engages stakeholders actively throughout the M&E process, including beneficiaries, communities, and other key actors. Promotes transparency, accountability, and ownership of the evaluation process.	Involves stakeholders in data collection, analysis, interpretation, and decision-making. Empowers communities to define evaluation criteria, share perspectives, and contribute local knowledge to the evaluation process.

Performance Measurement Frameworks	Establishes a structured framework for measuring and tracking performance across various dimensions, such as effectiveness, efficiency, and impact. Often used in organizational settings to monitor progress towards strategic objectives.	Defines key performance indicators (KPIs) aligned with organizational goals, sets targets for performance improvement, and monitors progress over time. Facilitates continuous improvement by providing feedback on performance and identifying areas for intervention.
Outcome Mapping	Focuses on identifying changes in behavior, relationships, actions, and activities of individuals and organizations. Emphasizes the importance of stakeholders' contributions and interactions in achieving desired outcomes.	Maps out causal pathways of change, identifies key actors and their roles, and defines progress markers known as 'outcomes.' Encourages stakeholders to reflect on their contributions to desired outcomes and adapt strategies accordingly.
Impact Evaluation Frameworks	Provide structured approaches for assessing the causal effects of interventions on desired outcomes. Typically involve comparing outcomes between intervention and control groups or using other methods to establish causality.	Incorporates various evaluation designs and methods, such as randomized controlled trials (RCTs), quasi-experimental designs, and counterfactual analysis. Helps measure the extent to which observed changes can be attributed to the intervention, allowing for robust conclusions about impact.

Table 3: Different types of Monitoring and Evaluation Systems

While each system has its strengths and limitations, effective monitoring and evaluation require careful consideration of the context, objectives, and stakeholders involved. By employing appropriate systems and methodologies, organizations can enhance their capacity to track progress, assess impact, and improve the effectiveness of their interventions, ultimately contributing to positive change and sustainable development.

Typically, monitoring and evaluation systems examine some key criteria. These include SMART criteria, REERS criteria and DAC criteria. These criteria collectively contribute to the success of M&E systems by providing a structured framework for goal-setting, monitoring, and evaluation.

The SMART criteria plays crucial roles in ensuring the effectiveness and efficiency of monitoring and evaluation processes. The SMART criteria is often defined as:

- **Specific**: The system captures the essence of the desired result by clearly and directly relating to the achievement of an objective and only that objective.
- **Measurable**: The monitoring system and indicators are unambiguously specified so that all parties agree on what they cover and there are practical ways to measure them.
- **Actionable and Attributable**: The system identifies what changes are anticipated as a result of the intervention and whether the results are realistic. Attribution requires that changes in the targeted developmental issue can be linked to the intervention.
- **Relevant and Realistic**: The system establishes levels of performance that are likely to be achieved in a practical manner and that reflect the expectations of stakeholders.
- **Time-Bound, Timely, Trackable, and Targeted**: The system allows progress to be tracked in a cost-effective manner at the desired frequency for a set period, with clear identification of the particular stakeholder group(s) to be affected by the project or program.

Another key criteria is the REERS. Although not all of these require systematic review in every case. The REERS criteria is defined as:

- **Relevance**: The extent to which an activity is suited to local and national environmental or developmental priorities and policies and to global benefits to which an organisation is dedicated. This analysis includes an assessment of changes in relevance over time.
- **Effectiveness**: The extent to which an objective has been achieved or how likely it is to be achieved.
- **Efficiency**: The extent to which results have been delivered with the least costly resources possible.
- **Result**: Results include direct project outputs, short- to medium-term outcomes, and progress toward longer term impact including contributions to global goals, replication effects, and other local effects.
- **Sustainability**: The likely ability of an intervention to continue delivering benefits for an extended period of time after completion; projects need to be environmentally as well as financially and socially sustainable.

Another key criteria is the DAC (Development Assistance Committee) criteria described by the Organisation for Economic Cooperation and Development (OECD). They are six and are similar to REERS. The DAC criteria are:

- **Relevance**: This criterion assesses the extent to which an evaluation is pertinent to the needs and priorities of the stakeholders involved. It looks at whether an evaluation addresses the key questions and objectives set out at the beginning.
- **Coherence**: Coherence evaluates the consistency and alignment of the evaluation with the broader goals, strategies, and policies of the organization or program being evaluated. It examines how well the evaluation fits within the larger context.
- **Effectiveness**: Effectiveness measures the extent to which the objectives of a program or project have been achieved. It looks at the results and outcomes of an intervention and whether they align with the intended goals.
- **Efficiency**: Efficiency evaluates how well resources (such as time, money, and human resources) have been utilized in relation to the results achieved. It assesses whether a program or project has been implemented in a cost-effective manner.
- **Impact**: Impact assesses the broader and long-term effects of a program or project beyond the immediate outcomes. It looks at the overall changes, benefits, or consequences resulting from an intervention.
- **Sustainability**: Sustainability evaluates the likelihood that the benefits and outcomes of a program or project will continue after the intervention has ended. It looks at the capacity of the program to be maintained or replicated in the future.

Activity 1

Complete the following assessment before moving to the next section.

1. At what stage of a programme should monitoring take place?

a.) At the beginning of the programme

b.) At the midpoint of the programme

c.) At the end of the programme

d.) Throughout the life of the programme

2. Which of the statements best highlights the difference between research and evaluation?

a) Research focuses on generating new knowledge, while evaluation focuses on assessing the value or effectiveness of existing programs

b) Research uses qualitative methods; evaluation uses quantitative methods

c) Research tests hypotheses; evaluation explores concepts

d) Research is always conducted independently, while evaluation involves stakeholders

3. Choose the option that BEST completes the analogy below.

If monitoring is similar to checking your meal to make sure that it is cooking correctly, then evaluation is similar to...

a) Serving a meal to a group of very important people

b) Tasting your meal and deciding whether it was cooked well

c) Writing the recipe for your meal

d) Replacing some of the ingredients that you used in your meal

4. The main difference between monitoring and evaluation is…

a) Monitoring creates data for your team to use. Evaluation creates data for your donors to use.

b) Monitoring is a simple process that anyone can do. Evaluation is a complex process that requires data analysis skills.

c) Monitoring happens daily, weekly, or monthly during a project. Evaluation happens at specific times after some work has been done.

d) Monitoring creates descriptive information about ideas. Evaluation creates information that can be easily counted.

5. What is the primary purpose of Monitoring and Evaluation (M&E) in project management?

a) To increase project costs

b) To assess project progress and effectiveness

c) To complicate decision-making processes

d) To delay project timelines


Bank lending to households
Bank lending standards
Credit standards - loans for house purchase
Credit standards - consumer credit
Decline in the stock prices of CRE investment trusts during the coronavirus pandemic
Asia
Europe
Oceania
Jan
2020
Feb

Planning

DEVELOPING A MONITORING AND EVALUATION PLAN

SECTION 2

A monitoring and evaluation plan ensures that project information is available as and when it is needed to make decisions and improve performance. It also provides information to demonstrate accountability to service users, other beneficiaries, donors and stakeholders. Drawing on lessons learned from previous interventions, a monitoring and evaluation plan should be developed for each project. Monitoring and evaluation plans support regular monitoring of projects so that decisions can be taken, and adjustments made as necessary throughout the duration of each project, and to ensure that progress is documented, and lessons are learned.

Monitoring and evaluation plans should be finalized shortly after the project logical framework is signed off and before project activities are implemented. Moreover, a monitoring and evaluation plan should seek answers to the following questions:

i. What do we need to monitor and evaluate – and why?
ii. What tools and/or methodologies will we use?
iii. Who will do what?
iv. When will we do it?
v. How much time will it take to implement each of the planned monitoring and evaluation activities?
vi. How much will it cost?
vii. How will the findings be shared and utilized?

Before developing a monitoring and evaluation plan, we need to have clarity on the following:

i. Project logical framework and activities.
ii. Indicators and targets set against the project objectives.
iii. Evaluation questions.

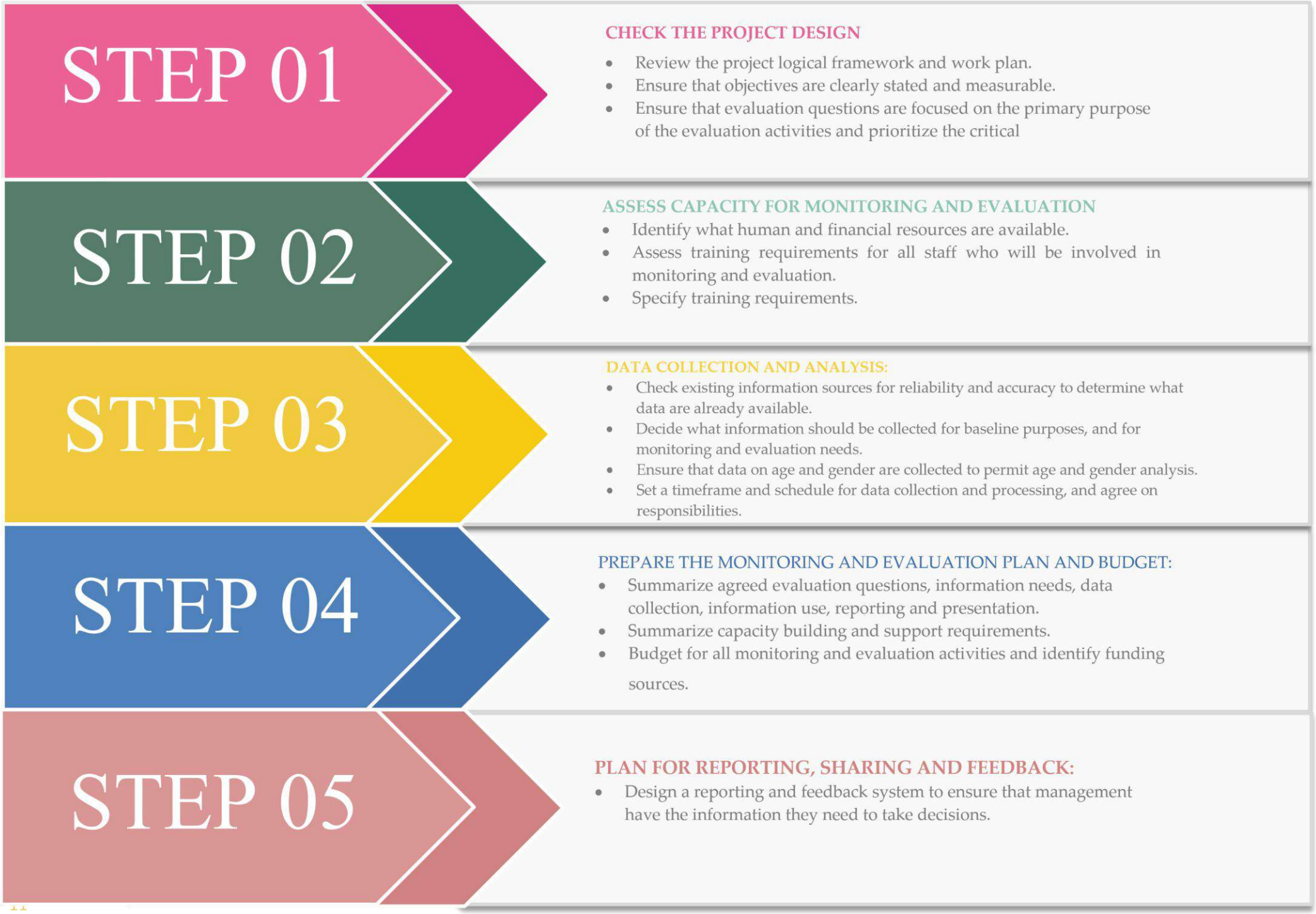
iv. Studies previously undertaken on similar interventions.

v. Data collection and analysis mechanisms, including collection of age and gender data.

vi. How the data will be used and by whom.

vii. Resources available (people, time and finance).

2.1. DEVELOPING A MONITORING AND EVALUATION PLAN



2.2. Developing indicators

An indicator is a marker of performance. It can be compared to a road sign which shows whether you are on the right road, how far you have travelled and how far you have to travel to reach your destination. Indicators show progress and help measure change. Indicators are signs of progress and change that result from an activity, project or programme. The word indicator stems from the Latin words "in" (towards) and "dicare" (to make known). Once developed, indicators provide guidance about what information should be collected and used to track progress.

2.3. Types of indicators

The following indicators are defined by what they set out to measure:

- **Input indicators:** These indicators measure the provision of resources, for example the number of full-time staff working on the project.
- **Process indicators:** These indicators provide evidence of whether the project is moving in the right direction to achieve the set objectives. Process indicators relate to multiple activities that are carried out to achieve project objectives, such as:
    - What has been done? Examples include training outlines, policies/procedures developed, level of media coverage generated.
    - Who and how many people have been involved? Examples include number of participants, proportion of ethnic groups, age groups, number of partner organizations involved.
    - How well have things been done? Examples include proportion of participants who report they are satisfied with the service or information provided, proportion of standards, such as in quality, that has been met.
- **Output indicators**: These indicators demonstrate the change at project level as a result of activities undertaken. They measure the direct products and services delivered by the project. Examples include
    - Number of teachers trained in new curricula or teaching methodologies.
    - Number of classrooms built or renovated.
    - Number of teenagers trained on sexual health.

- **Outcome indicators**: These indicators illustrate the change with regard to the beneficiaries of the project in terms of knowledge, attitudes, skills or behaviour. These indicators can usually be monitored after a medium to long term period. Examples include

    - Change in school enrolment rates.
    - Change in student dropout rates.
    - Number of students pursuing higher education or vocational training.

- **Impact indicators**: These indicators measure the long-term effect of a programme, often at the national or population level. Examples of impact indicators include

    - Change in student test scores on topics covered by a new curriculum.
    - Change in self-reported risky sexual behaviors among teenagers.

- **Proxy indicators**: These indicators provide supplementary information where direct measurement is unavailable or impossible to collect. For instance, if the contraceptive prevalence rate in a target population is unavailable, a proxy indicator derived from the contraceptive inventory data in the local clinics might be useful. Interpretation of proxy indicators should be done in a cautious and careful manner.

- **Quantitative and qualitative indicators:** All the indicators discussed above can be categorized as qualitative or quantitative indicators on the basis of the way they are expressed. Quantitative indicators are essentially numerical and are expressed in terms of absolute numbers, percentages, ratios, binary values (yes/no), etc. Qualitative indicators are narrative descriptions of phenomena measured through people's opinions, beliefs and perceptions and the reality of people's lives in terms of nonquantitative facts. Qualitative information often provides information which explains the quantitative evidence, for example, what are the reasons for low levels of condom use; why do so few young people attend a sexual and reproductive health clinic; what are the cultural determinants that contribute to high levels of gender-based violence? Qualitative information supplements quantitative data with a richness of detail that brings a project's results to life.

It is important to select a limited number of key indicators that will best measure any change in the project objectives, and which will not impose unnecessary data collection. As there is no standard list of indicators, each project will require a collaborative planning exercise to

develop indicators related to each specific objective and on the basis of the needs, theme and requirements of each project.

2.4. Project evaluation

In this section, some simple steps to follow before, during and after a project evaluation, as well as guidelines on developing terms of reference to support the evaluation process are outlined.

BEFORE THE EVALUATION

- Identify clear objectives for the evaluation based on the approved project proposal and the logical framework.
- Identify and prioritize evaluation questions based on the monitoring and evaluation plan and the resources available.
- Identify methodologies and tools to be used throughout the evaluation.
- Develop terms of reference outlining the plan, timeline, methodology/data collection, costs, roles of team members, logistics requirements (see section on developing a terms of reference below).
- Carry out a further review of documents.

DURING THE EVALUATION

- Conduct an initial briefing including a presentation, and question and answer session with the project implementation team.
- Carry out a further review of documents.
- Conduct in-depth interviews with key stakeholders.
- Hold meetings, interviews and/or focus group discussions with primary beneficiaries at a number of different sites.
- Undertake observation at the different sites.
- Review the functioning of the project management systems in place (data management, finance, logistics, and human resources).

AFTER THE EVALUATION

- Process and analyse data collected.
- Produce draft report.
- Share findings and draft recommendations with all stakeholders and discuss.

- Finalize report.
- Disseminate report with a view to making the information accessible to as many people as possible in the most appropriate format.

2.5. Developing terms of reference

A terms of reference (ToR) refers to a structured document explaining the purpose and guiding principles of an evaluation exercise. The terms of reference will specify the roles, responsibilities, organizations concerned, information required and expected output of the evaluation. It is a useful written plan of action and should answer pre-informed questions, for example:

i. Why is the exercise necessary?
ii. Why now?
iii. What will be covered and what will not be covered?
iv. How will the findings and learning be used?
v. Who should be involved?
vi. What questions should be asked?
vii. What methodologies should be used for data collection and analysis
viii. How much time is available for planning, implementing and reporting?
ix. What resources are needed/available?

It is always a good idea to include the following with the terms of reference:

- Conceptual framework of the project or project logical framework.
- Budget details.
- Map of project sites.
- List of projects/sites to be visited.
- Evaluation mission schedule.
- List of people to be interviewed.
- Project statistics, documents, reports already available.

PRINCIPLES OF DEVELOPING INDICATORS

THE DO'S	THE DON'T
√ Choose indicators that are specific, simple and have clear meaning.	× Don't lose sight of the objectives.
√ Choose indicators that are comparable across the target population and over time.	× Don't assume that data will be available– confirm it beforehand.
√ Agree with key stakeholders on the choice of indicators.	× Don't specify the direction of change (increase or decrease) expected (this is relevant only for the objective).
√ Choose data that are easily available and inexpensive to collect where possible.	× Don't use indicators that need expert analysis unless you have the expertise
	× Don't use more indicators than necessary.

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Thank you for your interest in LEAP Africa's MERL Toolkit & Handbook. To access the remaining sections, please request for a copy of the complete Toolkit & Handbook.

Contact the MERL unit via merl@leapafrica.org

Please visit LEAP Africa's website (https://leapafrica.org/merl) for more MERL resources.

Our MERL Services include

➢ M&E Consultancy

The M&E process can often appear complex and daunting. External expertise and support are frequently required to facilitate a streamlined process that delivers meaningful insights and actionable recommendations.

- Do you need assistance designing and choosing the best data collection tools and methodology for your programs?
- Looking for impact reporting solutions?
- Struggling with evaluating program effectiveness?
- Seeking guidance in monitoring project outcomes?
- Need expertise in designing evaluation frameworks?

Our team of experienced MERL professionals is here to guide and support you every step of the way. We offer a comprehensive range of services to enhance your M&E practices.

➢ MERL Training

Upskilling in MERL capabilities is essential for driving impactful results and promoting continuous improvement at both individual and organizational levels.

- Do you require support in training your staff for MERL tasks?
- Are you an individual new to MERL or a professional seeking to enhance your existing skills?

Our training programs cover a wide range of topics, including M&E fundamentals, advanced modules, research design, data collection techniques, impact assessment, and more.

➢ Research Services and Collaboration

Impactful programs, interventions, and policies are often driven by the thoughts and insights that emerge from research.

- Do you need support on your research projects?
- Are you looking for collaboration on research initiatives on *Youth-focused development; Leadership, Education, Entrepreneurship development, Active Citizenship in Africa?*

Our team offers a variety of research services and can support you in designing and implementing research studies that meet your organization's goals.

Reach out to us today.

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