

Service Workshop  
WIFSS M&E Plan

## Part 1: Basic concepts in M&E

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BRAIMOH BELLO



# Monitoring & Evaluation

What is monitoring?

What is evaluation?

Are they the same thing?

What are the objectives of each?



# WHAT IS MONITORING?

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Monitoring involves the continuous oversight of ongoing activities.



It involves counting what we are doing and routinely looking at the quality of our services.

SOURCE: The Global Fund M&E Toolkit



# WHAT IS EVALUATION?

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The systematic and objective assessment of the design, implementation and results of an on-going or completed project, programme or policy.



The aim is to determine the merit or worth of the programme or intervention.

SOURCE: The Global Fund M&E Toolkit



# WHAT IS M&E?

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## Monitoring

**Monitoring** is the routine process of data collection to provide information about progress toward targets.

## Evaluation

**Evaluation** is the use of research methods to systematically assess a project's design, implementation and results



# MONITORING VS EVALUATION: DIFFERENCES

Aspect	Monitoring	Evaluation
1. When?	Continuous: throughout the programme	Continual: at defined occasions e.g. baseline, mid-term and end of programme
2. Why?	Track programme performance against targets	Determine programme benefits (merits)
3. Where?	Programme area only	Can be programme and control (comparison) areas
4. Question	Are we doing <b>things right?</b> (efficiency)	Are we doing the <b>right thing?</b> (effectiveness)
5. Tools	Simple tools and methods	More complex tools and methods
6. Data source	Usually internal e.g., records and registers of the programme	Internal and external data sources e.g., surveys, secondary data
7. Who?	Mostly internal	Mostly external
8. Focus	The intervention: what is being done. Inputs and outputs	The people: e.g. lives changed Outcomes and impact



# MONITORING AND EVALUATION

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Both require data.

Both use indicators (often the same indicators).

Both use data to produce actionable information.

Both can produce quantitative and qualitative data.

Both require logframe/theory of change.

Both complement the other.



# Why do M&E?

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1. To strengthen the design and implementation of programmes.
2. To generate knowledge and inform future programming.
3. To justify use of resources (increasing cost-effectiveness).
4. To promote and celebrate the work done
5. To meet organizational requirement.
6. For advocacy and resource mobilization.



# VALUE OF MEASURING PERFORMANCE

## **Box i.iv**

### The Power of Measuring Results

- If you do not measure results, you cannot tell success from failure.
- If you cannot see success, you cannot reward it.
- If you cannot reward success, you are probably rewarding failure.
- If you cannot see success, you cannot learn from it.
- If you cannot recognize failure, you cannot correct it.
- If you can demonstrate results, you can win public support.

Source: Adapted from Osborne & Gaebler 1992.



# QUICK CHECK: MONITORING AND EVALUATION

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**What I've  
learned so far...**

# M&E Framework

What is a framework?

What is an M&E framework?

What are the key elements?

Let's start with a simple logic model



# WHAT IS A FRAMEWORK

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- ✓ Thandeka, a university student, was born into a poor home. Her family have lived in rented apartments since she was born. Things were difficult for them. She believes that if she gets a degree, life would become much better for the family.
- ✓ Thandeka explains her logic to her mother.
- ✓ She then creates a simple conceptual framework (logic model) for her logic.



# THANDEKA'S DREAM

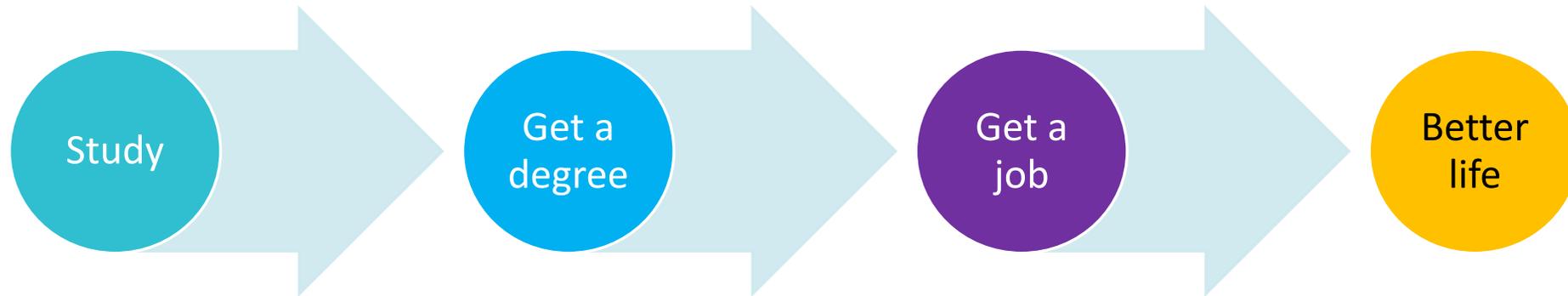
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- ✓ Thandeka, a university student, was born into a poor home. Her family have lived in rented apartments since she was born. Things were difficult for them. She believes that if she gets a degree, life would become much better for the family.
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# THANDEKA'S LOGIC MODEL (FRAMEWORK)

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# LET US DISCUSS THANDEKA'S LOGIC MODEL

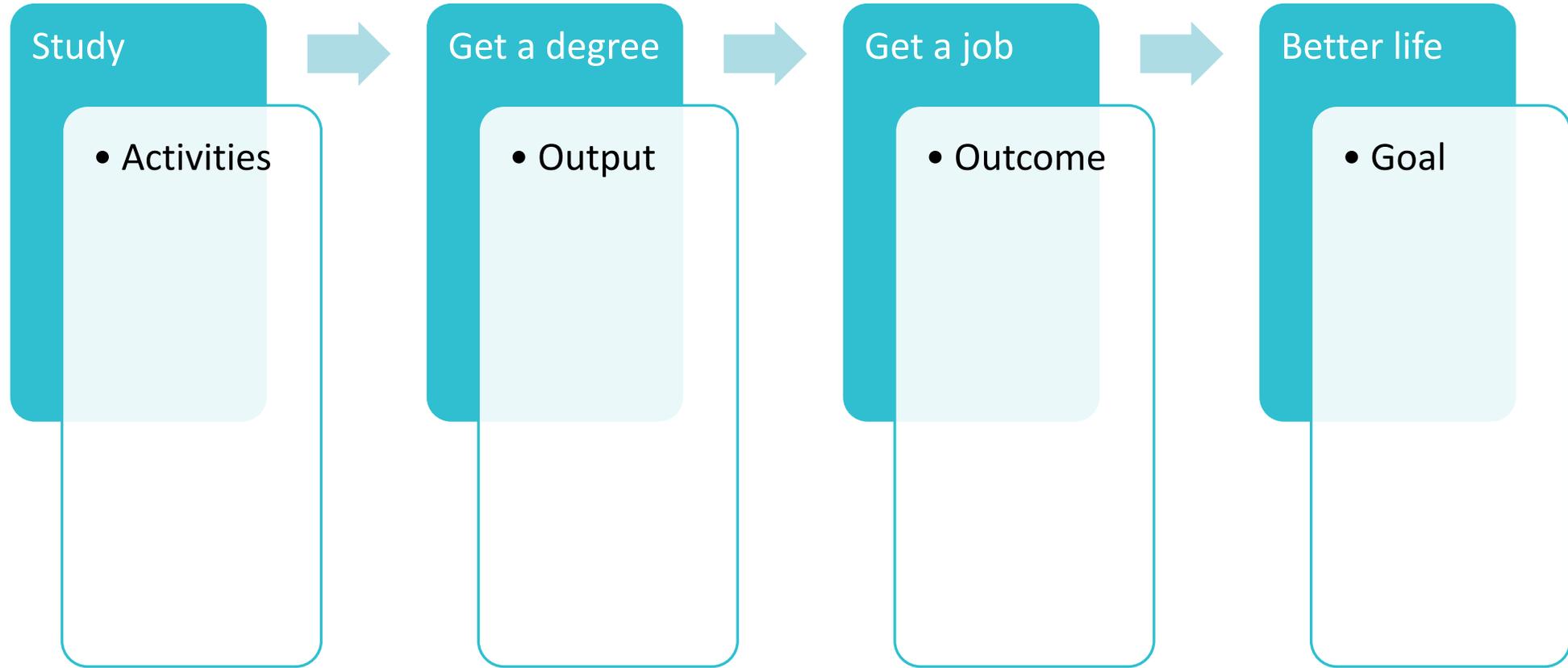
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- ✓ What problem is Thandeka trying to solve?
- ✓ Do you agree with her logic model?
- ✓ What assumptions do you think she made?
- ✓ How long do you think the process will take?
- ✓ What resources does she need?



# THANDEKA'S LOGIC MODEL

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# LOGICAL FRAMEWORK

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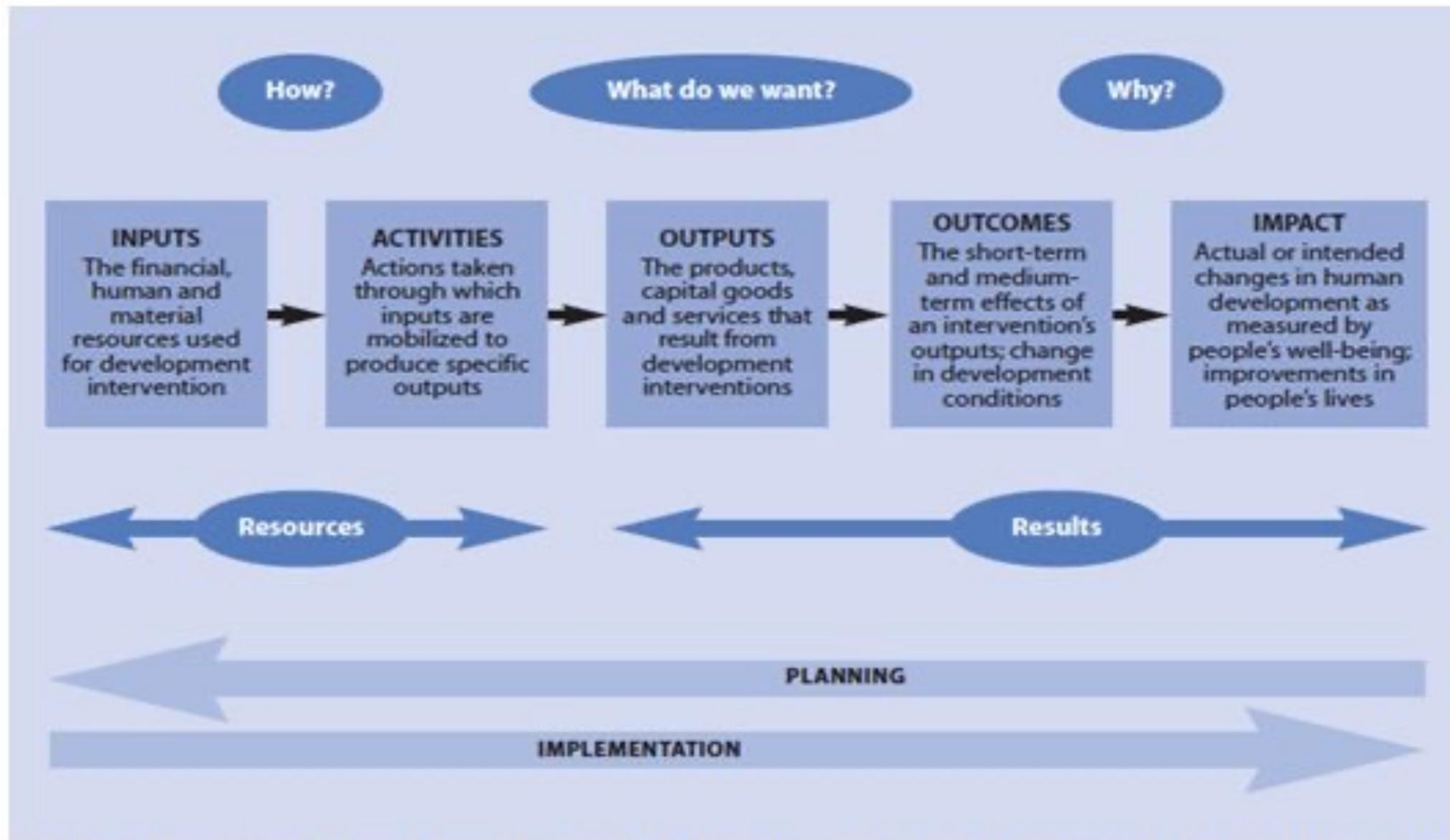
- ✓ The program logic that explains how the development objective is to be achieved, including the causal relationships and underlying assumptions.
- ✓ Hierarchical description of a programme from operational level to desired/hypothesized impact.
- ✓ Shows the main elements (results) in a project and the logical linkages between them.
- ✓ Gives a results-based description of the programme.
- ✓ It is a result-based framework.



# LOGICAL FRAMEWORK

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- ✓ An organisational framework for planning, management and M&E.
- ✓ Shows how activities will lead to outputs, and how these will lead to the outcomes and impact.
- ✓ Helps to identify short-term and long-term goals.
- ✓ Helps to develop indicators for monitoring and evaluation.
- ✓ Also called a logframe (tabular matrix).
- ✓ Sometimes called logical model (schematic diagram).

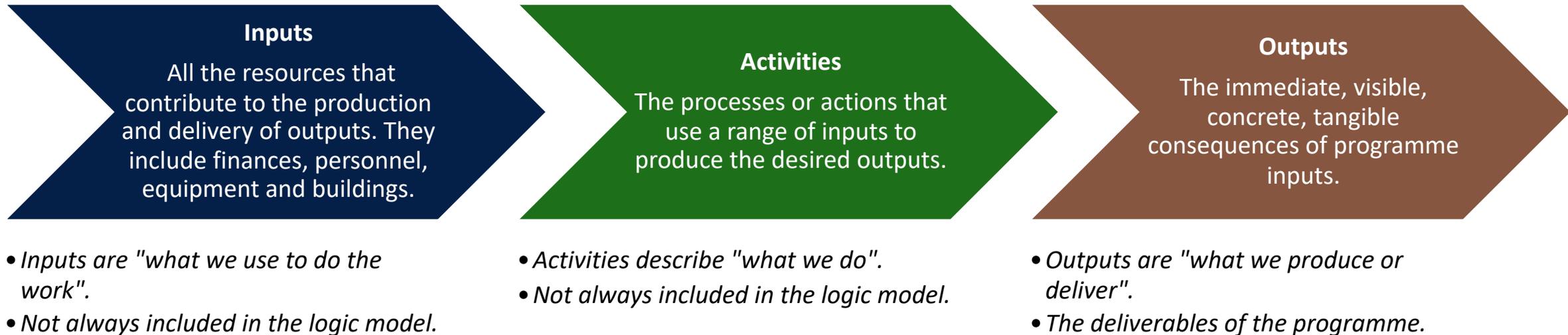


Source: UNDP Handbook on Planning, Monitoring and Evaluation for Development Results (2009, p55)



# LOGICAL FRAMEWORK

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# LOGICAL FRAMEWORK

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## Outcomes

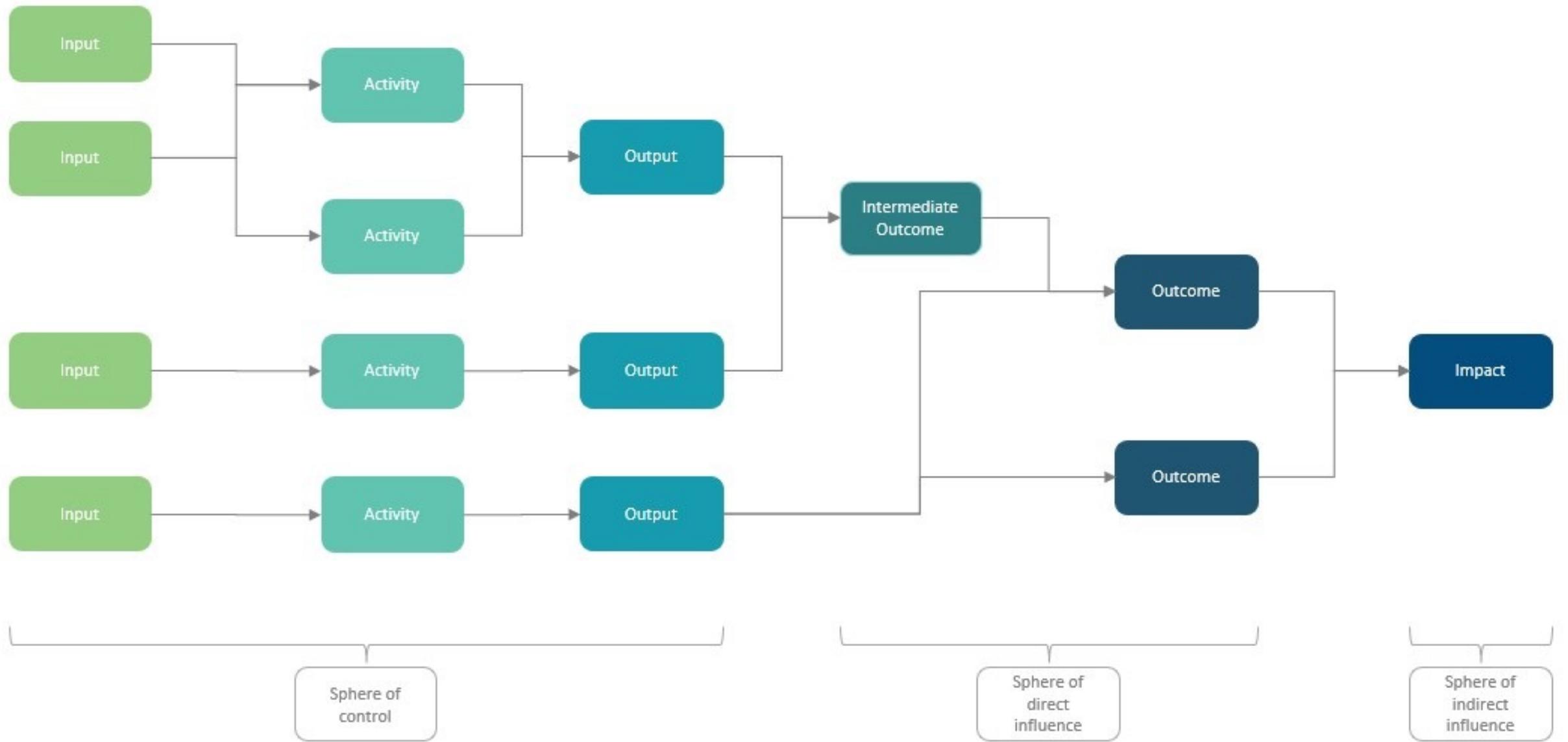
The medium-term results for specific beneficiaries that are the consequence of achieving specific outputs.

- Outcomes are "what we wish to achieve".
- The motivation for the programme.
- Medium term.

## Impact

Impacts: the results of achieving specific outcomes, such as reducing poverty and creating jobs.

- Impacts are the lives we change.
- Could be in health, education, economics, etc.
- Long term.





# QUICK CHECK: LOGICAL FRAMEWORK

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**What I've  
learned so far...**

# Indicators

Provides information to monitor performance.

It is a tool that tells us about achievement and progress.

Critical component of M&E.

There are indicators for the different result levels of the logical framework

- Input indicators
- Output indicators
- Outcome indicators
- Impact indicators

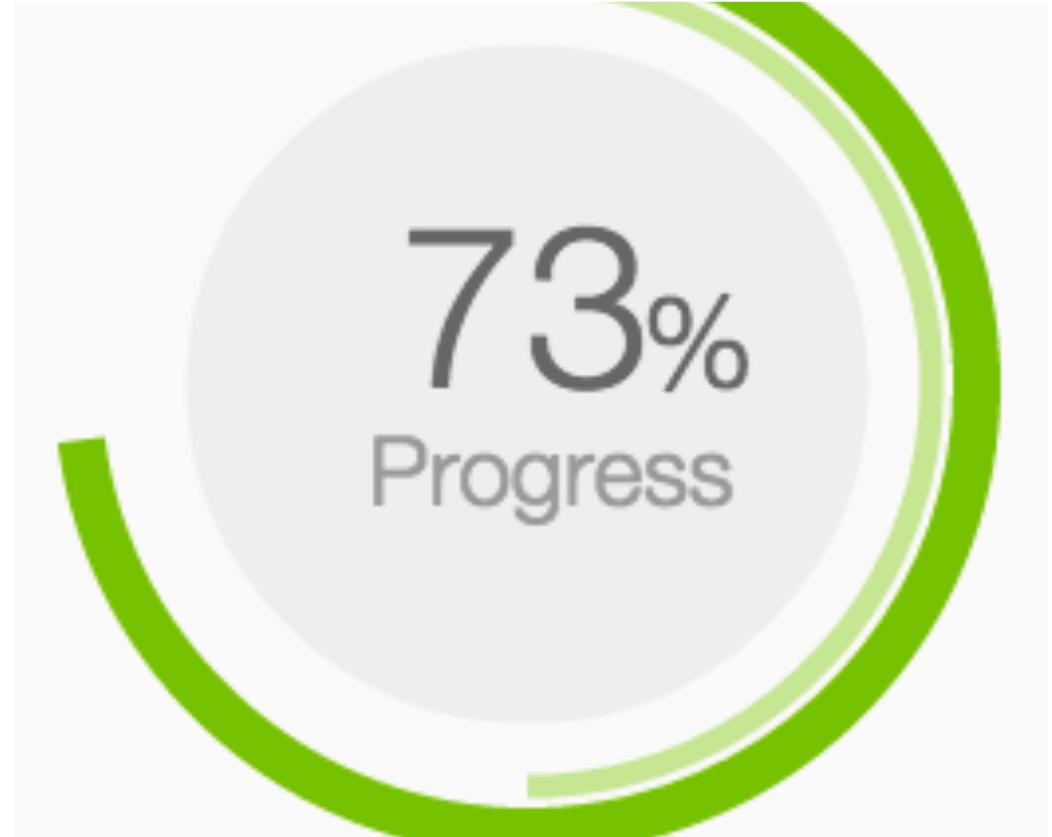


# WHAT IS AN INDICATOR?

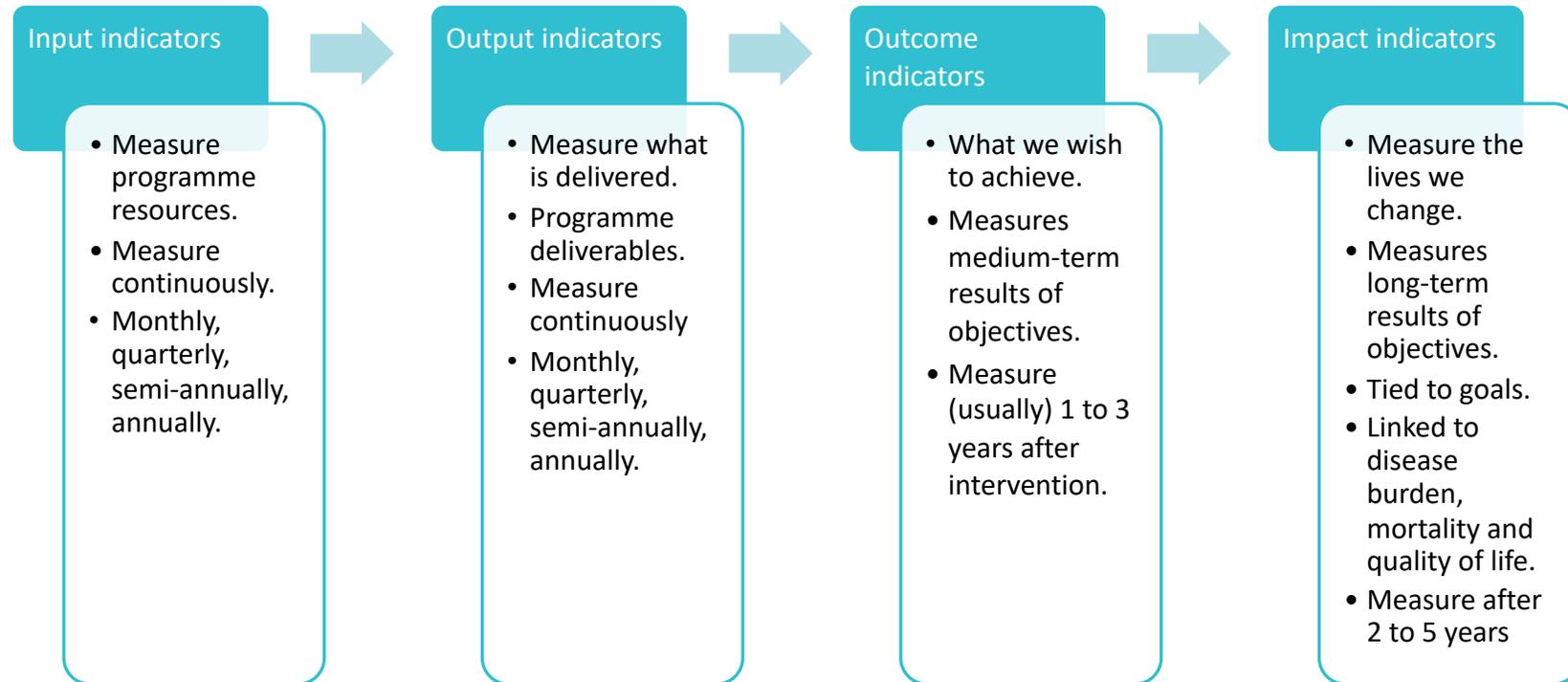
An indicator is a **variable (a metric)** that **measures one aspect of a programme/project.**

Examples:

- Number of hours a student studies in a day.
- Number of students who attended a seminar.
- Number of new employees at a workplace every month.
- Number of students who passed an exam.



# Hierarchy of Indicators





# BREAKAWAY SESSION

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**What I've  
learned so far...**

## Quick Check 1: What I learned so far (Monitoring and Evaluation)

- 00:52:13 Laurika Wiese (CUT): Difference between monitoring and evaluation; what each involves; why M&E is important.
- 00:52:25 Ziyanda Febana (Unisa): Reacted to "Difference between m..." with 👍
- 00:52:33 Christina Harvett: To consider the different types of evaluations, depending where you are in the process.
- 00:52:40 Emelina Mutabazi Nizere: We should use data to guide our actions
- 00:52:41 Potso Molebatsi: Formative evaluations is important for the success of the project.
- 00:52:51 Lekau Rachidi: A new perspective on the difference between M&E
- 00:52:54 Riashna Sithaldeen UCT: A significant insight for me is that the two are not necessarily a package, depending on what you are needing to do
- 00:52:54 Fayth Ruffin UKZN: Distinctions between M&E empower data to talk from the different perspectives.
- 00:52:59 Constance Khupe, Wits: I got the difference between Monitoring and Evaluation much more clearly.
- 00:52:59 Oliver Gore (NWU): Monitoring as a continuous process while evaluation is episodic
- 00:53:00 Doret Kruger: That you don't need to do M&E together, it can be done separately.
- 00:53:07 Elizabeth S Ndofirepi (WITS): What monitoring and evaluation is and the differences
- 00:53:11 Tumi Khunou - NWU: Even though M&E can be done simultaneously, they both have differences and more especially, when they which one is to be done.
- Monitoring is done more during a project and evaluation, at the end of the project
- 00:53:16 Mpe Meintjes NWU:Clarity on differences between the two concepts is valuable.
- 00:53:16 Mawande Tshozi: Thank you Braimoh for explaining the difference between M and E for student success.
- 00:53:20 Mantsipane Reuben Legodi - UNISA: I have learned that data points you in a certain direction if it is utilised properly
- 00:53:24 Ephraim Mhlanga -Saide: You mention that monitoring focuses on Inputs & Outputs. Should it also focus on processes?
- 00:53:25 Thakatau Hlakotsa (Wits): Monitoring - involves mainly numbers (counting). Evaluation - more in-depth, requires research expertise.
- 00:53:26 Raazia Moosa: That evaluation can take place before we start a project, during a project as well as at the end of a project.
- 00:53:31 Subethra Pather: The importance of M&E starting at the initiation of a project and through-out the project
- 00:53:32 Edwina Fransman: Monitoring is routine process of data collection and evaluation use of research methods for assessment
- 00:53:33 Laurika Wiese (CUT): I have learnt that monitoring and evaluation strengthen the design and implementation of programmes, and even justify the use of resources.
- 00:53:34 Lekau Rachidi: I also liked the CCTV analogy regarding monitoring

- 00:53:39 Neo Langa: The different types of Evaluation and the importance of formative assessment
- 00:53:41 Ntokozo Sigwane (UNISA): I have learnt that M&E can use the same indicators but evaluation is systematic and monitoring involves a continuous oversight.
- 00:54:00 Riashna Sithaldeen UCT: concepts of formative and baseline evaluations very useful, reminiscent of action research approaches
- 00:54:01 Elizabeth S Ndofirepi (WITS): Evaluation needs knowledge of research methods hence it is systematic.
- 00:54:14 Ashne Billings: That sometimes the two terms are conflated and often used interchangeably. These are very different things and most importantly M- (are we doing the right things) & E- (are we doing THE right thing)
- 00:54:25 Johara Khan- Stellenbosch University: M&E is a complementary but separate process where we use data to drive our decisions. I learnt the differences between the simple oversight of activities (monitoring) and the more complex systematic assessment of the worth of ongoing activities (evaluation)
- 00:54:32 Edwin Mabelane: Monitoring is important for progression and relevancy purposes of a programme.
- 00:54:41 Nelisa Tshaka, UNISA: The difference between the continuous nature of monitoring and that of evaluation that is continual

## Quick Check 2: What I've learned so far: Logical Framework

- 01:25:05 Potso Molebatsi: Logical Framework is like guide or roadmap that shows how things linked towards the goal.
- 01:25:14 Leandra Jordaan | CUT: Clarity on the steps from input - impact (a great breakdown)
- 01:25:48 Deepti Charitar: How events are linked together - inputs, activities, outputs, outcomes and impact
- 01:25:55 Johara Khan- Stellenbosch University: process to map your thinking, management and planning of how to want to achieve your overarching goals
- 01:25:55 Nelisa Tshaka, UNISA: The meaning and purpose of a framework.
- 01:25:57 Riashna Sithaldeen UCT: I like the spheres of influence, it helps to be realistic about the possible contribution of any single intervention
- 01:25:59 Constance Khupe, Wits: Clarity on what is in one's control and what is not.
- 01:26:10 Constance Khupe, Wits: Reacted to "I like the spheres o..." with ❤️
- 01:26:16 Johara Khan- Stellenbosch University: Reacted to "Clarity on what is i..." with 👍
- 01:26:21 Ziyanda Febana (Unisa): Clarity on outcome and impact - Impact : measured by people's well - being or improvement in people's lives
- 01:26:22 Mpe Meintjes NWU: Different spheres: Control vs direct influence vs indirect influence
- 01:26:24 Tumi Khunou: Outcome: Medium term based and is what we would like to achieve from a project.
- Impact: Long term -the change which the project has resulted.
- 01:26:33 Mantsipane Reuben Legodi - UNISA: A logical and systematic process needed

- 01:26:34 Fayth Ruffin UKZN: Linking relationships, causal analysis, check the relationship between objectives and outcomes on the one hand and goals and impact on the other hand. Consider scale and scope.
- 01:26:39 Christina Harvett: Reacted to "I like the spheres o..." with 👍
- 01:26:49 Riashna Sithaldeen UCT: Replying to "I like the spheres o..." and that the student success framework is likely to be additive
- 01:27:03 Elizabeth S Ndofirepi (WITS): Elements of the framework: inputs, activities, outputs, outcomes and impact
- 01:27:09 Lekau Rachidi: Reacted to "I like the spheres..." with 👍
- 01:27:45 Elizabeth S Ndofirepi (WITS): ELEMENTS DIVIDED INTO SPHERES OF CONTROL

### Quick check 3: What I've learned so far: Monitoring and Evaluation

- 03:12:46 Potso Molebatsi: It is interesting to know the difference between data and information.
- 03:12:48 Christina Harvett: It is important to know if a programme is working or not
- 03:12:58 Hayward Barends (UCT): The interplay between data and information
- 03:13:06 Ntokozo Sigwane (UNISA): I have learnt the difference between data (unprocessed facts) and information (conclusions from processed data)
- 03:13:12 Mohau Ben Manyarela: I wish we had a training like this before developing plans.
- 03:13:17 Ziyanda Febana (Unisa): Reacted to "I have learnt the di..." with 👍
- 03:13:19 Ashton Maherry (Saide): Just remember that data is biased
- 03:13:32 Leandra Jordaan | CUT: M&E efforts that are centralised could save resources if duplication of efforts are spotted.
- 03:13:35 Mpe Meintjes NWU: Importance of data collection - in any instance really!
- 03:13:37 Riashna Sithaldeen: I like parcelling out of data vs information. it seems like a lot of strategy is about collecting more and more data without being strategic about what information it provides...in fact you can get a lot of information without overinvesting in more and more data
- 03:13:45 Nelisa Tshaka, UNISA: The symbiotic relationship between data and information - how to differentiate between the two.
- 03:14:16 Edwina Fransman: Data is gold and very important factor in a programme
- 03:14:18 Doret Kruger: Clarification between data and information.

Siyaphumelela  
Service Workshop  
WIFSS M&E Plan

## Part 2: WIFSS M&E Plan

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BRAIMOH BELLO



**Wits Institutional  
Framework for  
Student Success  
(WIFSS)  
M&E Plan**

Why?

What?

How?

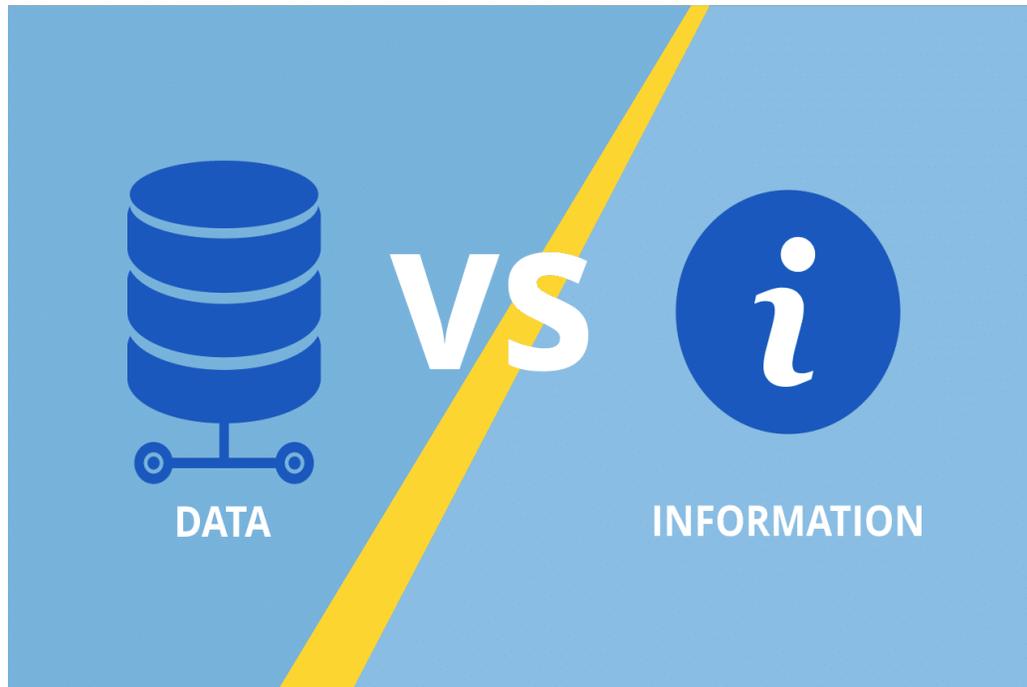
# Why a university- wide M&E plan?





# DATA

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Data = unprocessed facts.

From these facts, we reason and draw conclusions.

Information: conclusions and insights drawn from processed data

Data is low-level knowledge;  
information is high-level knowledge.



# DATA

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Data is superior to expert opinion.

Data is king

Methods are kingmakers

Data is the most important parameter for an organisation





# Formula-1

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What gives Formula-1 winners competitive advantage?

The driver? The Car? Or Data?

The first two need the third.

- 3 terabyte of data in one race
- Quality of questions
- Winners are decided by data



# United Parcel Service (UPS)

**Can we reduce consumption by finding faster routes for our drivers?**

By using big data:

- 10,000 vans with sensors to optimize the routes
- The drivers drove a total of 19.5 million kilometers less per year.
- They saved 38 million liters of fuel.
- Increased profit.





# WHY A UNIVERSITY-WIDE M&E PLAN?

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Monitoring and evaluation of its many activities.

Programme design and resource allocation.

Student development process

Strategic direction



# QUICK CHECK: MONITORING AND EVALUATION

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**What I've  
learned so far...**

# What we did

Steps	Steps in developing the M&E Plan
What	What we did



# STEPS IN DEVELOPING THE M&E PLAN

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1. Step 1: Understand the assignment
2. Step 2: Desk review: secondary data
3. Step 3: Primary data: key informant interviews
4. Step 4: Data analysis.
5. Step 5: Email validation
6. Step 6: Data validation workshop
7. Step 7: Email validation



# WHAT WE DID

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1. Step 1: Programme description
2. Step 2: Development of the programme theory of change (ToC)
3. Step 3: Development of the M&E framework
4. Step 4: Specifications of the M&E system



# BREAKAWAY SESSION

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1. Do you think universities need M&E plan for their interventions?
2. List three interventions in your university to improve student success.
3. For each intervention, list two output indicators (n = 6)
4. For each intervention, list one outcome indicator (n = 3)
5. List two overall impact indicators for the three interventions (n=2).