Toolkit for TTT M&E
MSiS 2004-2005

MS Travelling Topic Team on M&E

Contents

Our task as TTT is to furnish COs and partners with workable M&E systems. We have chosen to focus on monitoring rather than evaluation because we realise this is where the biggest challenge lies in MS.
We have to think about our development work in a new way, and it cannot be done with a quick fix. A good monitoring system thrives on clear, precise, and specific objective oriented plans. It is not common that human beings live their lives within such logical frameworks. However, we invite you here to embark in changing work-culture. In the future we hopefully will see it as a natural and obvious thing to do transparent, open, and precise monitoring.

Adan Kabelo (PO, MS Kenya) *Charlton Sulwe* (PO MS Zambia) *Peter Sigsgaard* (MS International Department)

1 Welcome and introductions

1.1 Welcome to participants

- General welcome to all and thanking everybody for being willing to use time on the exercise.
- A special welcome to the POs who are later to repeat this exercise and programme flow with a couple of selected partners.
- Emphasise that we will share our tools with you as a *supplement* to what you have in place already.

1.2 Why TTT?

MS invented this TTT exercise on a serious background.
Over the years three major evaluations have strongly criticised MS and its partners for not having an effective M&E system in place. The recent evaluation made by DANIDA again noted – and rightly so - that we could not convincingly document results and impact.
The people we are working with rightfully can ask us: *What is it actually that you are doing for us*? We are also under an increasing pressure from a government in Denmark, which is not particularly generous to MS. Also our own Board has lost patience. The situation is strongly discomforting in a time where we find much more competition among development organisations.
It is even more serious that MS and partner organisations seem to learn very little from experience. This is also a sign that we lack systematic, useful, and relevant information about our own performance. How can you work on development when you cannot develop yourself?
It is not that we do not try to counter the critique. Several country programmes have frantically, and each in their own way, constructed elaborate – and *costly* –systems. Very few of them have produced significant results or knowledge. The systems are simply not used and evaporate without leaving any trace. What we get is discouragement and we note an embarrassing waste of money, time, and dedication.
A little later we go through the specific objectives that we intend to accomplish. We are here to recommend simple core systems to be used in the same manner all over the MSiS. We will get away from a situation where country programmes just take bits and pieces of the centrally recommended systems, change them here and there, and then follow their own route.
There is nothing wrong with locally adapted or extended systems, but MS will insist on a core system that is uniform in time and style. Such a system is a precondition for consolidated reporting of what we do in MSiS.

1.3 Introduction of participants

To get to know each other, but also as a prelude to the forthcoming discussion: Ask each participant to introduce themselves by stating job function, educational and professional background, and experience with M&E.

1.4 Overall objectives for the TTT process

The overall idea behind the TTT on M&E is to build the capacity of a given MS CO (especially Directors and Programme Officers) to strengthen their own ability as well as that of their partners' to engage in meaningful monitoring.

We are thus convinced that the process will lead to:

- Partners and Country programmes adopting and developing systematic, simple monitoring processes, and
- A significantly increased capability of the MS country programmes and partners to document how their endeavours contribute to developmental change, and
- Outside observers will be able to identify areas where MS country programmes and partners clearly have learned from recorded experience.

The TTT will thus focus on "training" Programme Officers and MS Directors. They should "learn" to introduce simple M&E procedures and tools to the partners – and to follow up on the processes that they initiate.
We also want a manageable system. Let there be no doubt that the TTT on M&E embark on its task under the headline: *Make it simple – stupid!*

2. Why Monitor

Monitoring can be described as the systematic and continuous process of gathering and analyzing of information about the progress of the work we are doing and its effects over time.

2.1 Key Usefulness of Monitoring

Monitoring, therefore, serves the following important purposes, namely to:

- Facilitate organisational learning and development: What are the lessons from our experiences? Do our efforts work as expected? Do we need to change strategies? Participatory monitoring stimulates dialogue, reflection, analysis, and action.
- Assess progress: Organisations and individuals in them have a need to know how they are doing. It gives a reassurance to know that we are on track.
- Enhance transparency and accountability: The people we work with have the right to know how we are doing. We should also be accountable to the donor. Monitoring is a pre-condition for open sharing of results.
- Furnish us with convincing evidence that can be used in lobby and advocacy.

3. Experiences with Monitoring

Attempts to integrate monitoring systems in organisational life are confronted with many challenges. In the test workshop made by the TTT members, the facilitator asked the others to describe their experiences with monitoring until now, and to come forward with problems encountered, bottlenecks identified, or general challenges. We came up with the following main challenges that are further unpacked below.

How do we create a culture of monitoring, using simple and user friendly tools, which balance both qualitative and quantitative approaches?

How do we involve information users and the relevant stakeholders in information collection and analysis and give feedback in an appropriate and timely fashion?

What becomes our starting point if no baseline information was collected at the initial planning stage before intervention started?

3.1 Elaboration of challenges faced?

Demystify Monitoring and evaluation:

- There is generally apprehension about the difficulty of monitoring. It has always been considered scientific and the domain of professionals. M&E systems have tended to be complicated, "scientific and objective" and thereby creating an exclusive group of users.
- Another challenge is the need to demystify the concept of "measurement": There has been overreliance on quantitative measurements or information. Many donors and managers have principally requested numerical (quantitative) information about a piece of work. It looks more precise and leads one to believe that it is easier to compare and summarise than qualitative information.
- The perception of monitoring as a policing (faultfinding) exercise.

Participation and involvement

- Low priority in Organisations for monitoring systems: persons expected to carry out data collection are frequently expected to take this role as an "additional" task, to be worked in and around the more important service-oriented tasks.
- Capacity in monitoring (data analysis and weak data management systems): Organisations often lack data analysis skills, so collected information sometimes ends up unanalysed and unused. Lacking capacity, staff/communities shy away from monitoring. They perceive it as something mystical rather than an everyday activity.
- Information users: identification of information users and involving them in the whole process is not always thoroughly done. Involving potential users in the design of monitoring will not only help them clarify their information needs (*negotiating* them), but also ensure their support for the M&E system and utilisation of its findings.
- Taking information away, not giving feedback: failure to get feedback to field staff about the information that has been collected contributes to low morale and a perception that such an activity is not as important as other duties. Furthermore, failure to give feedback to the community and beneficiaries breeds suspicion and reduces support to the activity.
- Defining what to monitor and how much: The specific information needs are not usually assessed leading to the creation of system with too many indicators, poor or non-existent information storage and retrieval systems.

Starting Point:

- The lack of baseline information makes it difficult to have a starting point of comparison, see also p.20.

Application of Monitoring Systems

- Centralised versus decentralised systems: We respect and acknowledge decentralised monitoring systems. At the same time we need some degree of uniformity for the purpose of comparison and overview of MSiS programmes? The MS Country Programmes follow different and incomplete standards.

4. Essentials of a good monitoring system

The characteristics of a good system can be many and it is often overwhelming to read about all the criteria that theoretically should be met. One has, however, to accept that MS or its partners cannot meet all the more sophisticated demands – and there is also not a need for it. Below is a list of some important characteristics produced in a brainstorm sessions with Directors and Program Officers in a country programme. The list can be used as a checklist against which to compare the outcome of a like brainstorm given session with POs or Partners.

4.1 What characterises a good monitoring system?

Accuracy: (Is the information collected reliable?)

- The monitoring systems and the tools used should provide information that shows the true situation.
- Its background should be a simplified overview of *minimum* information needs and systems for its collection and analysis; (Do not be over- ambitious or ambiguous on what to measure).
- It contains standardised guidelines on how to collect and analyse information.
- It makes it possible to verify information sources and methods of collection.

Relevance: (Is the information relevant to the user's needs?)

- The system should be *interactive* and *not extractive*. (The user of the information should carry out the collection, analysis, and utilisation of the information. The data should remain with the user).
- The information generated by the monitoring systems should be relevant to and understood by all users.
- The system should only have few, negotiated, simple, realistic performance and impact indicators.

Informative:

- The monitoring system should give timely feedback to inform planning and decision-making.

Cost-effective: (is the exercise worth the cost?)

- The cost of collecting and managing the information should not be too high.
- The system is built on simple and manageable tools for collection and analysis.

Credibility: (Is the information trustworthy?)

- The information generated from and the monitoring system should be trustworthy.
- The system should allow for transparency about methods used to obtain data and draw conclusions.
- The analysis should address and discuss attribution issues (whether results can be claimed by the activities of the organisation).

Institutionalisation

- The system should be integrated into the activities and not seen as add on.

5. Proposed monitoring tools

In our search for workable monitoring tools that meet the criteria outlined above, the TTT drew lessons from the varied experiences from users of many types of tools. We propose the following methods to be adopted as a basic minimum for tracking MS' performance and that of our partners. Partners or country offices can add on other tools they wish to.

5.1 The quarterly monitoring chart

Successful monitoring system starts from explicit planning. Before monitoring takes place, there has to be a plan. It is the execution of the plan that is being monitored.
It is imperative that we know whether we have achieved what we intended to achieve and whether our actions are leading us to the desired situation. Without a clear direction then it's true that '*you cannot get lost if you do not know where you are going*'.
The system below thus presupposes existence of a clear plan and links the agreed objectives to the activities and to the intended or unintended results and gives you room to reflect. In the chart below, you can see an example of a first quarter in 2004. It has been filled out for one objective.

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QUARTERLY monitoring CHART (QMT)

Quarter $\boxed{1}$ **2 3 4** **Year 2004**

Objectives Drawn from the PA	**Quarterly Planned Activities** *(From the annual work plan)*	**Achievements** **as per the activities**		**Effects/Changes noted**		**COMMENTS** ☺ 😐 ☹ …. *Describe your own expression/assessment of each activity/objective*
		Expected *(as stated in the plan)*	**Actual** *(reality as noted after implementation)*	**Expected** *(as stated in the plan)*	**Actual** *(reality as noted after implementation)*	
Objective 1	Activity 1					
	Activity 2					
	Activity 3					
Objective 2 Eliminate incidences of preventable health diseases in 10 primary schools in Katangi location by the end of 2005	Construct 1 water tank in each school to harvest rain water	3 water tanks to be constructed this quarter	3 water tanks constructed in 3 schools	Waterborne diseases among students reduced	No changes in disease trend noted	😐 The tanks were just completed at the end of the quarter and there was no rain water harvested. Next quarter will be rainy season.
	Introduce CTC to 2 teachers from 10 schools	20 teachers to be trained in CTC	15 teachers trained on CTC	Preventable diseases like scabies and diarrhoea reduced	No changes in trends noted	☺ 10 teachers started a CTC club in their schools and they have already noted improved personal hygiene among the pupils.
	Conduct quick assessment of the extent of the problem among pupils in the 10 primary schools.	Data on the number of pupils with scabies, ringworm and waterborne diseases recorded	Survey established that 3 in every 8 pupils are affected every quarter.	Local health staff and school administration and parents sensitised on the problem	Parents, teachers, pupils now determined to eradicate the problem in the schools.	☺ The sharing of the findings made teachers and parents determined to eliminate the problem in the schools. All the schools now want to emulate the 5 schools which have initiated the clubs. The health workers also support the school clubs by giving talks.

Objective 3	Activity 1					
	Activity 2					
	Activity 3					

NB: This table should be enlarged to accommodate legible writings inside

We propose that the above chart is enlarged and posted on the partner or CO notice board where it can be seen by all. The partner or the COs agrees on who should fill in and how often it should be updated. Since this is intended to be an interactive chart, we suggest that it be updated as frequent as practical by the people involved in implementation of the activities. We shall however ask the users of the chart to agree on this.

What happens at the end of the quarter?

The chart should be filled by the end of the quarter and another chart is prepared for the next quarter and posted on the board.
Those working with the chart will often face some difficulties in relating the objectives to the activities. Interpretation of the objectives and their meaning may also be differing among the stakeholders. The problems may stem from too broad and unclear formulation of the objectives in the Partnership Agreement. The same may apply to the activities stated herein.
It will thus often urge the users of the chart to revisit the objectives and activities and search for more specific wording and clear interpretations. The Quarterly Monitoring Chart thus challenges you to reconsider the relationship between objectives, activities, desired results and the indicators.
The management and the relevant stakeholders then discuss the past quarter by looking at the chart that is now hanging somewhere in the boardroom or the office. The meeting should critically reflect on the impressions and the progress in the past quarter by asking themselves

- What has gone well in the quarter?
- What were the challenges and problems encountered?
- What can be done to improve in future and what needs to be followed up?

This discussion is summarised in writing and filed in an active file while the chart is kept hanging at the office.

Similar reflection session is held at the end of second quarter but then there will be two charts on the wall (including that of the 1st quarter). So the management has an overview of six months of working. Issues that were noted for follow-up in the previous quarter should also be discussed here through the previous minutes. The minutes from this meeting is then used as a semi-annual report to be shared with MS' Country Office. In this case the focus of the report is quite clear as informed by the chart and saves the writer(s) the agony of thinking what happened six months ago.

When MS' Country Office uses the Quarterly Chart to monitor its programme performance, the charts can be used for the half-annual and the annual report written to MS and to the Annual Meeting in the country programme.

5.2 Annual Partnership Reviews as a monitoring tool

The TTT proposes the annual reviews as another key monitoring tool in itself. However, the modes of doing the reviews differ from one country to the other. *We propose the quarterly monitoring chart becomes the point of departure for all reviews.*
By the time of the annual reviews, there are at least three Quarterly Monitoring Charts, which should be pasted on the wall for the participants to study and reflect on it critically.
They should seek to understand the successive charts by discussing

- What trends or patterns can be deduced from the charts?
- Are there emerging challenges or issues that needs to be addressed?
- What is their overall assessment of progress towards the planned objectives?
- How can the lessons gained here influence the next work plan?

Since MS CO will also be represented in the review, the report of this workshop can be used as the annual report from the partner. The chart could be sent as a photograph annexed to the minutes.

Feedback from the country office

For a functioning monitoring system, there must be adequate feedback mechanism. Feedback is when those receiving information react to the providers by giving their comments.
Therefore, The Program Officer should write his/her reactions to the specific partner after receiving the minutes and charts from them.

When the CO receives the semi-annual report through the already described process from the partner, they should analyse the information gathered from all the partners and make an overall impression on performance per thematic focus. This means interpreting for each theme in the policy paper of the country programme:

- What has gone well ,
- What were the challenges faced and
- What is the way forward

This information is shared with all the partners in the magazines or newsletter and is a subject of discussion in the annual meetings. The PAB should discuss the analysis given and advice on the policy implication.

Danish Association for
International Co-operation

5.3 The Most Significant Changes Approach

The tool described here can be used at Partner Level. You can copy this section 5.3 into a new document. After this you delete this boxed text, and you can then print it as a small booklet with information about the approach as we use it in MSiS.

Most Significant Changes
MSC

A guide for monitoring at partner level

MS – The Travelling Topic Team on M&E - April 2004

The MSC method

The Most Significant Changes method is a simple, participatory tool for *monitoring*. It is not suited for evaluations, which are made when activities are completed.
The method is an important supplement to MS' other monitoring system. It looks at what is important to people and places our activities in a wider context. You could say that we *monitor the social environment* within which we operate.
The method does not operate with pre-defined indicators, but allow for people themselves to invent them on basis of the daily realities. It often grasps the unforeseen consequences of our activities.
As an organisation, you simply ask a well-informed person to identify changes (for better or worse) in the life of poor people. You also ask about how the change has come about and whether it is attributable to your activity as an organisation. You record *the* change they select as the most important, and *why* they have chosen it.
The procedure is repeated after one year.
The MSC system will thus produce a number of changes written down. Some of them, but not all, relate to your goals. By sitting together and reflecting on the "stories" told, we learn from the realities as people see them. Your organisation will learn from the experience documented.
The method has been tried out with a number of MS partners in Mozambique, Zambia, Tanzania, and Kenya. We now want to scale up. We expect that all country programmes use it – and use it in the same way - by December 2004.
The following pages describe how you – as MS office or MS Partner - go about making it a vibrant part of your monitoring activities.

We will here underscore how important it is to follow the outlined procedures and ask the questions as they are put here. We cannot say very much of the effects of MSiS as a whole, if each of the partners or country programmes do what they like with the system and pull in different directions.

We are convinced that both MS as an entity and the partner organisations will benefit from applying this simple system. Furthermore, we would also like to emphasize that the efforts will not cost extra work. The investment in this necessary monitoring replaces other obligations and procedures inherent in the partnership.

Adan Kabelo, Programme Officer, MS Kenya
Peter Sigsgaard, Programme Co-ordinator, MS Denmark
Charlton Sulwe, Programme Officer, MS Zambia

Step 1: Find an interviewer

You identify a person (or a small team) in your organisation, who will be responsible for interviewing. The interviews should take place as a minimum once in a year some time before the Annual Review Workshop arranged with MS.

It may be an idea to gather the interviewers and other interested persons at an MS Zonal/Regional or Annual Meeting for a brief session where questions about the MSC methodology can be answered and discussed. A small "training session" could also be held, where you try out the interview format with some informants.

Step 2: Identify 1-2 informant(s)

The interviewer identifies one or two persons to interview (informants)[1]. They should be from the area where your organisation works, and they should be considered well informed about what is going on in the community. Thus, the chosen woman or man could be anybody who is conversant with positive or negative changes in other people's life.
Experience has shown that extension workers in the area are very good informants. Other good informants are found among e.g. social workers, local teachers, religious leaders, women group organisers, and the like.

Step 3: Questionnaire

A simple questionnaire is found in Annex 1 (p.17).

Besides the question you are also asked to identify your organisation and the person interviewed. These identifications are important as it makes it easy to interpret the information and to follow up on a few of the more interesting cases.

Step 4: Conducting the interview

The following is addressed to the interviewer:
You arrange for a meeting with the informant(s) and explain the purpose of the exercise. The purpose has to do with your organisation's need for knowledge. It is looking for getting a feeling of the environment in which it operates. In other words: You would like to record positive or negative changes in other peoples' lives.
Then you read aloud the first questions and record the answers. You may need to explain certain parts of the question. By doing this, please try not to influence the answers. You can find some hints about non-directive interviewing in Annex 2 (p.18).

Write down what the informant concluded as a *short* statement formulated as if the informant tells it to us directly in first person.

> Do not write: Mrs. X said that freedom of expression had improved significantly during the last year.
> Rather write: "Today we can criticise our government and chiefs in public when they do not deliver fertiliser in time or give it to their political friends. This was not possible one year ago, at that time we feared prison."

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[1] Here we get information from individuals only. The MSC method can also be used with bigger groups, e.g. in Partnership Review Workshops. In such cases, an experienced facilitator is needed. The MS Country Office has some descriptions of how this can be done.

By recording the statements with words as used by the informant, you add life and meaning to what people tell you, and it makes interesting reading later on.

Step 5: Making use of the information

Keep the completed forms in a proper file where it is possible to find them again. If possible, also save the material electronically in (Word or RTF format).
Make sure that the answers are discussed at staff meetings, board meetings or the like. As many as possible should have the opportunity to reflect on the question: What can we learn from these answers?
MS asks you to bring the "stories" recorded to the next Annual Review Workshop. Here the stories of change can be used as point of departure for programme discussions.
The stories from all the different Partner Review Workshops will be collected by MS and also used for discussion in the PAB.

MSC Questionnaire
Most **S**ignificant **C**hanges

MS Partner name:	
Date	
Name of interviewer:	
Who was interviewed? Name and position of person in relation to community or area where you work.(This information is given to characterise the source)	
Question 1: *Thinking back through the last year, what do you think has been the **most** significant change (for better or for worse) in the lives of poor people in this area?* *Give at least <u>two examples</u> that illustrate the change.*	
*Why do you find especially this change is the **most** significant?*	
Question 2: *What has made this change that you mention come about?* ⇨	

[If no mentioning of your organisation has been made, pose this question:]

Is there any change in the life of poor people that can be attributed to what my organisation [name] has done here?
Illustrate with examples.

Interview as a non-directive dialogue

The interview is not a classroom examination. Try to make it as relaxed as possible and give it a character of a dialogue. If you have two informants, then let them discuss and agree to one joint statement.
Be careful to stress that we are after perceptions of changes in other peoples' lives in general, not the personal experience of the informant. And try to get the stories as specific as possible. You often have to probe and ask for examples:

Informant: "There are signs that now harmony is bigger in the families."
Interviewer: "Signs? What do you mean by signs, which signs?"
Informant: "Now many wives discuss family-budgets with their husbands, and they can even dispose of money that the husband has earned. This is because of the work done by the Women's Group in this community."

The above example can be extended with the Interviewer asking: How many are "many Wives?"
The informant will often answer by mentioning activities and all the nice things that the organisation has done. Here you also have to probe:

Informant: It is a change that XX has conducted training for members of the community.
Interviewer: *Yes, I understand that there has been some training, but what has changed in peoples' lives because of that?*

Sometimes, it is discussed what counts as a change. A change can be big or small, positive or negative, and could affect a single individual, a small group, or an entire organisation: the point is that it is seen as a long-term, sustainable change rather than a one-off thing. In a few cases, a 'change' may be something that stays the same – for example; something continues which would most likely have stopped otherwise.
Does the change have to be about work objectives of the partner?
No. We anticipate that many change stories would be directly connected with the work of the partner; however, if the most significant change is to do with other things that have happened, for example, in the local community, that is fine.
If the informant says that there has been no change whatsoever, you may respond that this cannot simply be true. There are always changes, they may be small, but nothing is like it was a few minutes ago - then ask for the most significant change among the tiny ones.
In a few cases a delicate situation may occur. If the informant is employed by the partner organisation, (s)he may be hesitant to talk about negative changes under the heading "Organisational Performance." Whether it occurs depends very much of general leadership style and "climate" in the organisation. If you sense such hesitation, you can skip the question, but please write a note about it in the form.
When a change "story" has been formulated, you may need to ask the informant to summarise the central content in a few sentences. In the pilot test, we often used this question to elicit a summary:
Interviewer: If you were to tell this story to a journalist of CNN and want it to make headlines, what would you say?

5.4 Frequently mentioned issues related to Monitoring in MSiS

When we discuss M&E, the following questions pop up again and again. The TTT position is that we have to be very flexible. It is not for MSiS to document our endeavours by scientific standards. We are not to prove anything in court. The important thing is that our information is trustworthy.

The question of the missing baseline

It is difficult to assess change if we have no knowledge of what the situation was like before we started our activities. Few partners have immediate access to such a baseline that can serve as a point of departure. The task often seems to be overwhelming. We here share a simple process of developing baseline data.

- As you discuss with the partner during the partnership agreement writing, agree and describe one or two key but simple indicators, which you will use during the period of partnership.
- You then use the key indicator(s) to describe the state of the situation by using available information. E.g. you can establish the numbers of people affected by waterborne disease from the local health institution, you can establish the average maize production per acre from the local farmers or the extension agent or you can establish how many women are in influential positions in groups of mixed gender. Data from other organisations will also be useful to refer to. Such information can be the baseline that is recorded in the partnership agreement.

However, if the baseline is missing, *you can always use the Quarterly Monitoring Chart instrument to produce one*. The first time you use the chart, make sure that the actual situation and the actual achievements are duly *recorded*, *stored*, and *remembered* in order to serve as a baseline for future investigations.

Causality or attribution

As organisations we are not initiating or *doing* development alone. The process of change is already there and it is influenced by a multitude of factors. Our contribution may be small and we will rarely experience cases where our activities alone have led to change.
This being the case, we should be content with demonstrating that a given change is *attributable* to activities supported by our organisation. This means that programme monitoring should include descriptions of processes leading from our activities to the observed change.

Securing simple and negotiated indicators

Too many indicators in the development world are constructed at office desks. If they are very sophisticated and statistic in nature, they will rarely be used. We simply do not have the resources to run the studies that are necessary.
Every MSiS organisation should insist on including only one or two *simple* indicators per objective, and the users of the information generated should create this indicator. In practice this means that a *negotiation* has to take place between stakeholders about how performance will be measured. All have to contribute with answers to the questions: How can we know that a given effect of an activity has been achieved? What information should we consider when filling in our Quarterly Monitoring Chart?

Sampling, How to identify informants?

[This question is often raised. We will include it in a possible M&E manual, and propagate the system of getting data from small, carefully selected samples rather than interviewing just the persons living around the corner or those that a given organisation always point at as good informant about their activities.]

How to understand measurement?

[goes to MS manual, if there is a need: TTT members will remember to propagate the idea that "measurement" can be everything from precise descriptions to using a very detailed yardstick – a description of a condition is as good an indicator as a number or score brought about in a dubious fashion. It is only pseudo-precise]

6. The Way Forward

This part of the Programme flow is to be made *after* the POs have had an opportunity to introduce the tools to one or two selected partners together with a member from the Topic Team. It is part of the final debriefing before the TTT members leave. It is important that the debriefing includes participation of the Country Programme Director (in the case of MS being the "target organisation").
In the case where a partner is the "target", the PO should make sure that the leadership in the organisation is present during debriefing and that specific commitments and pledges are made.

6.1 Reflections of the experiences by introducing the new system

At a meeting with all POs and the Co-ordinator we facilitate a structured discussion about the way the exercises with the partners went:

- What was easy, what was difficult?
- What will it be like when the PO is acting on his own?
- How can we secure that the tools will be used as a common procedure in the Country Programme?
- How do the tools tally with the existing system?
- How secure that information is stored and is retrievable? Role of Programme Administration?
- Do we see some areas where we need continued outside support for introducing the tools?

Most of the questions should also be discussed with the partner when the Programme Officer follows up on the visit where the tools have been introduced.

6.2 Agreement on the Way Forward

During the debriefing, the TTT members urge the POs, the Country Office Director, and the Administrator to work out a rough but specific plan for continuing the process that is now set in motion. The plan should be written down and confirmed by the Director. The plan is included in the report for the visit sent to the CO.
A time in the not so far future (approximately three months) is set where the TTT member responsible for the visit will follow up and ask for information about how the process is running.
The TTT is filling out its own Quarterly Monitoring Chart, and the information about the process is also needed for that.

Annex a) Introductory Letter to CO

8th April 2004
The Director MS Zimbabwe and Programme Officers,

Dear Patrik and the programme staff,

Re: Visit by the M&E Travelling Topic Team (TTT)

On behalf of M&E travelling topic team, I am confirming that Team members Peter Sigsgaard of MS Denmark and Adan Kabelo from MS Kenya will visit you from 6th To 12th May 2004.

As you might be aware, the overall idea behind the TTT on M&E is to build the capacity of MS CO (especially Directors and Programme Officers) and enhance their own ability and that of their partners' to engage in a simple, manageable and user friendly monitoring system. TTT will thus focus on "training" Programme Officers and MS Directors to "learn" to introduce simple M&E procedures and tools to the partners – and to follow up on the processes.

The visit by the TTT will consist of:

1) 1-day workshop for Director, POs and relevant administrative staff. You can decide to invite members of your PAB, some DWs and some partners too if you wish. The total number of the participants however should not exceed 10 excluding the topic team members. This will be on the first day of the exercise. This is where we shall discuss the proposed simple format with you.
2) ½-day workshop with POs only on the second day where the main topic is making plans for the workshop with selected partners.
3) 1-day workshop with relevant staff and management of each of the 2-4 partners who will be visited. Here we expected the programme officers will discuss with the partners the new suggested format and agree on how to follow-up.
4) ½ day feed-back/discussion with country office with country office staff. We recommend that after the completion of the field visit, the TTT members and participating POs and the director discuss the challenges, problems, and potentials related to new M&E system operationalisation.

TTT will insist on furthering *few* and *extremely simple* procedures and tools. Experience has convinced us that complicated, ambitious, and fancy systems will only have a little chance of being implemented. We will share with you what we consider to be such a simple system during our workshop. We would be grateful if you sent us at least two weeks before our meeting any materials that you may have on M&E that you are using.

We kindly ask you to identify a contact programme officer for the TTT who will collaborate with the team before, during and after the country visit. S/he may also be a resource/focal person on M&E for your country programme. This is a decision to be taken by your country programme itself.

We ask you to identify 2 to 4 partners to be visited during this exercise. We suggest that you get the appointments with the partners and clearly explain to them the purpose of the visit well in advance.

The TTT members will be overall responsible for the country office based workshop, but will expect the POs to organise and facilitate the partner workshops, where they are to get experience in introducing the new monitoring systems.

Participants of the partner workshops should be the programme officers, one of the two Topic Team members and relevant implementing staff from the partner organisation.

After the completion of the programme, the M&E TTT will write up a short report and submit it to the CO. This should not be later than one month after the visit.
At the end of our visit, we envisage that:

- CO programme staff will appreciate and understand the importance of adopting a workable monitoring system.
- Management, CO programme staff and central administration persons will be committed to introduce some simple monitoring tools in a disciplined way (following the agreed guidelines and procedures to secure a necessary degree of uniformity of the MS monitoring procedures)
- CO programme staff will have got experience in working with simple monitoring tools and are confident in introducing them to the partners and following up.
- CO management and programme staff have adopted a plan of action securing introduction of the mentioned tools to all the partners within a period of maximum one year.

I hope this is clear but please do not hesitate to seek further clarification just in case it's not. We will need to keep our communications open until and after the process.

Thank you and looking forward to see you then.

Annex b) Internal guideline for TTT-M&E

Lusaka, April 2004

Overall objectives for the TTT process

The overall idea behind the TTT on M&E is to build the capacity of a given MS CO (especially Directors and Programme Officers) to strengthen the partners' as well as their own ability to engage in meaningful monitoring.
We are thus convinced that the process leads to:

- Partners and Country programmes adopting and developing systematic, simple monitoring processes, and
- A significantly increased capability of the MS country programmes and partners to document how their endeavours contribute to developmental change, and
- Outside observers will be able to identify areas where MS country programmes and partners clearly have learned from recorded experience.

The TTT will thus focus on "training" Programme Officers and MS Directors. They should "learn" to introduce simple M&E procedures and tools to the partners – and to follow up on the processes that they initiate.
TTT will insist on furthering *few* and *extremely simple* procedures and tools. Experience has convinced us that complicated, ambitious, and fancy systems will only have a little chance of being implemented. It is very easy to add on to simple systems when one has a need to do this – but it is nearly impossible to save a more complicated one from disaster by cutting out elements here and there.

Specific objectives of country visits

a) CO programme staff will appreciate and understand the importance of adopting a workable monitoring system.

b) Management, CO programme staff and central administration persons will be committed to introduce some simple monitoring tools in a disciplined way (following the agreed guide-lines and procedures to secure a necessary degree of uniformity of the MS monitoring)

c) CO programme staff will have got experience in working with partners on introducing simple tools and monitoring procedures.

d) CO management and programme staff have adopted a plan of action securing introduction of the mentioned tools to the partner within a period of maximum one year

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Working modalities of TTT on M&E

The travelling topic team on M&E will travel in teams of two, cf. Annexed plan p. 28. Each time one of the two will have a co-ordinating responsibility and prepare the country visit in collaboration with the CO.

Peter Sigsgaard (MS-Denmark Programme co-coordinator) will act as overall co-ordinator of the TTT-M&E.

The TTT on M&E allocates 7-12 days altogether for each country programme visit (including travel). Apart from that, time needs to be set aside to prepare for the visit and write a short country report after the visit.

Each CO will identify a contact programme officer (contact PO) to collaborate with the TTT before, during and after the country visit. He/she may also be a resource/focal person on M&E for the concerned country programme. This is a decision to be taken by the country programme itself.
Peter Sigsgaard will write to all COs and ask them to identify a contact PO just after Easter 2004.

Each country visit will consist of:
1. A 1-day workshop for Director, POs and relevant administrative staff. The CO can decide to invite members of PAB, some DWs and some partners too. The total number of the participants should not exceed 10 (not counting the two TTT-members).
2. A ½-day workshop with POs only; the main topic is making plans for test-seminars with selected partners
3. A 1-day workshop with relevant staff and management from 2-4 partners, and
4. A ½-day feed-back/discussion with country office staff.

The TTT members will be overall responsible for the workshops, but will ask the POs to organise and facilitate the partner workshops, where they are to get experience in introducing the monitoring systems.

Participants of the partner workshops should be the Country programme officer, one of the two Topic Team members, and relevant staff from the partner organisation.

The TTT-M&E recommends that after the completion of each field visit the TTT members and participating POs discuss with CO on issues (challenges, problems, and potentials) related to promoting simple M&E procedures at partner level.

Reports and Sharing of Information

Under the below heading "Timing" is mentioned letters that are to be sent to the participating countries.
All such letters should be copied to MS- International Department (Att.: Peter Sigsgaard), to the country office director in the country visited, and to either the country director in Zambia or in Kenya (depending whether it is Charlton or Adan who is the responsible TTT member).

After the completion of the programme in a given country, the TTT-member responsible for this visit write up a short report and submit it to the concerned CO. The CO and the other TTT members should receive the report not later than one month after the visit.

Any relevant guideline reports and other material on M&E will be sent to contact PO.

An e-mail network consisting of TTT members and contact POs will be established. The TTT in general will disseminate:

- Relevant and good tools related to M&E.
- relevant literature but not long reports
- Information practising on M&E.

Concrete output of the TTT M&E

- Reports on all countries visited
- Guidelines and ideas related to M&E included in forthcoming Partnership Toolkit
- An e-mail network on M&E (in forthcoming new MS Intranet)

Timing

- An overall plan indicating periods for visits to different country programmes was agreed with the COs in April 2004.
- The TTT member responsible for co-ordinating the respective visit should ensure that dates for workshops and partner visits) are settled with country contact PO as early as possible.
- The co-ordinating TTT member should send out intro-letter to CO as early as possible and latest 4 weeks before visit.
- The co-ordinating TTT member should request and obtain possible relevant documents on M&E used by the country programme. He should disseminate this to the other participating TTT member no later than 2 weeks before the visit.
- Both TTT members read the papers before arriving in the country.
- The co-ordinating TTT member is responsible for gathering notes from the workshops + edit the final report to the country office. The final report should be ready no later than one month after the country visit.

Annex c: Tentative Plan for Visits 2004-2005

M&E	Initial Work-shop	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)	Country visit (workshop + partner visit)
Time	April 5-12 2004	June 7-16 2004	August	December 6-17 2004 Tentative,	November 15-19 2004	October 21-28 2004	Some time in March 2005	May 2005
Country	Zambia	Uganda	Kenya	Tanzania	Zimbabwe	Mozambique	Central America	Nepal
Co-ordinator of visit	Charlton	Charlton	Adan	Adan	Peter S.	Peter S.	Adan	Charlton
Participants	Topic Team (all members) + country office staff where relevant. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	*Workshop:* Charlton + PS, POs, Director + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	MS Kenya has chosen to start with a meeting for all partners. The Country Director prom-ised that exer-cises on QMC *and MSC* will be made with each partner	*Workshop:* Adan + Mutu-que, POs, Direc-tor + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	*Workshop:* Adan + PS, POs, Director + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	*Workshop:* PS + Adan, POs, Director + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	*Workshop:* PS + Adan, POs, Director + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries	*Workshop:* Programme Co-ordinator from MS + Mutuque, POs, Director + relevant admin. staff. *Partner visits (2 – 4 partners)* 1 TTT member, 1 PO, Partner, Beneficiaries