



WOMEN *for* WOMEN
A GIVING CIRCLE



UNIVERSITY of NORTH CAROLINA
ASHEVILLE

Monitoring & Evaluation Guidebook for the Collaborative High Impact Grant

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Overview

- Why conduct monitoring and evaluation (M&E)?
- How do we start a M&E process?
- What is a project's *Theory of Change*?
- How can we use the project's Theory of Change to design the project and develop a M&E plan?
- How to conduct M&E?
- What are WFW's M&E expectations?
- How can we support your M&E efforts?

Why conduct M&E?

- Accountability, yes – but also ***LEARNING!***
- Ultimate goal of M&E:

Figuring out what works and what doesn't so we can design better projects and improve more lives

How to start a M&E process?

- Begin developing a M&E plan during the project planning phase by carefully thinking through how project activities will lead to short-term outcomes and, in turn, long-term social impacts
- The M&E process and the project design process are both grounded in a project's *Theory of Change*

What is a *Theory of Change*?

- A project's Theory of Change describes how the project's activities are expected to result in social change
 - *A causal chain of events leading from activities to short-term outcomes to long-term impacts*

- A good Theory of Change is clear and concise and can be stated in 1-2 sentences
 - *Note: Ultimate goals (long-term impacts) are realistic and achievable within the scope of your project*

Theory of Change

- Revisit assumptions
- Identify gaps in project logic and leaps of faith
- Design better projects
- Provide a clear framework for developing a M&E plan
 - Choose indicators for each step in the causal chain: Activities, Outcomes, and Impacts
- M&E provides another opportunity to check project assumptions and logic – but this time using project data

Example Theory of Change

The Project's Theory of Change:

The project will connect low-income individuals to health insurance, health providers, and social services, which will increase use of health care services and result in improved health and overall socioeconomic well-being for project beneficiaries.

ACTIVITIES

(what the project does)

- Help clients navigate health insurance markets and enroll in health insurance
- Connect clients to primary-care providers
- Connect clients to job-training programs and educational opportunities



OUTCOMES

(short-term results of project activities)

- Increase in clients' use of health care services
- Increase in clients' participation in job-training programs
- Increase in clients' participation in GED and university programs



IMPACTS

(long-term social impacts of project)

- Improved management of clients' diabetes and hypertension
- Decreased unemployment and increased income
- Clients feel greater control over their lives and increased happiness

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ACTIVITIES

(what the project does)

- Help clients navigate health insurance markets and enroll in health insurance
- Connect clients to primary-care providers
- Connect clients to job-training programs and educational opportunities

Indicators:

- % enrolled in health insurance
- % with primary care provider
- % enrolled in job-training programs
- % enrolled in GED, community college, or university program

OUTCOMES

(short-term results of project activities)

- Increase clients' use of health care services
- Increase clients' marketable job skills
- Increase clients' educational levels

Indicators:

- Visits to primary care providers and specialists
- % completed job-training program
- % completed GED, community college, or university program

IMPACTS

(long-term social impacts of project)

- Improved management of clients' diabetes and hypertension
- Clients experience decreased unemployment and increased income
- Clients feel greater control over their lives and increased happiness

Indicators:

- Diabetes measurement
- Hypertension measurement
- % employed
- Income
- Stories capturing clients' subjective experiences

How to conduct M&E?

- Indicators/Evidence can be quantitative or qualitative
- Data can come from internal tracking reports and/or additional data-gathering efforts
 - e.g., interviews or surveys with sample of project beneficiaries or relevant experts – for example?
- Track indicators, review progress towards goals, and report on results regularly (every 6 months)



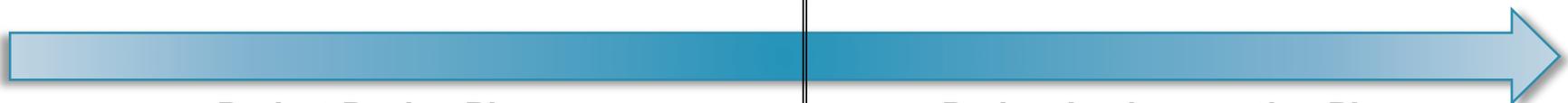
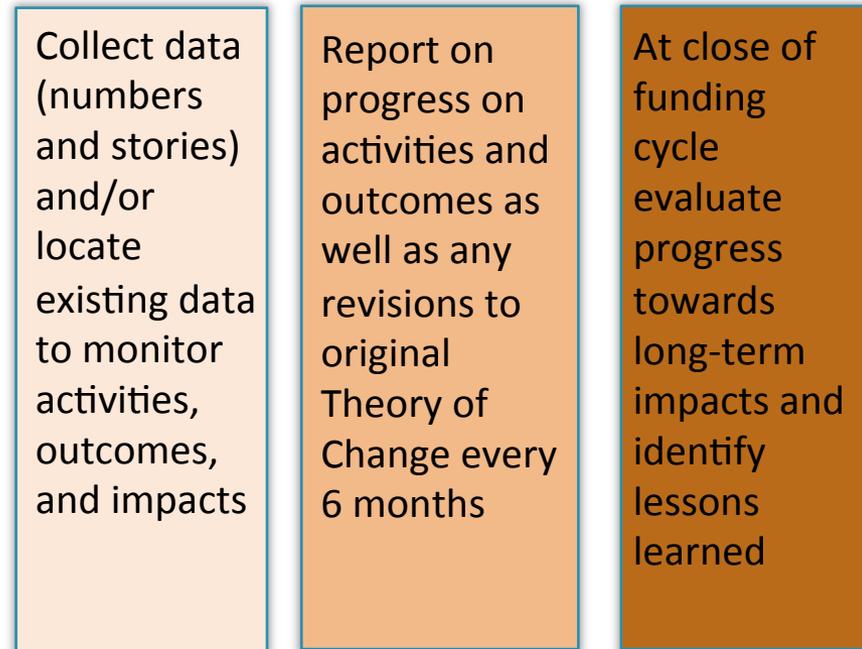
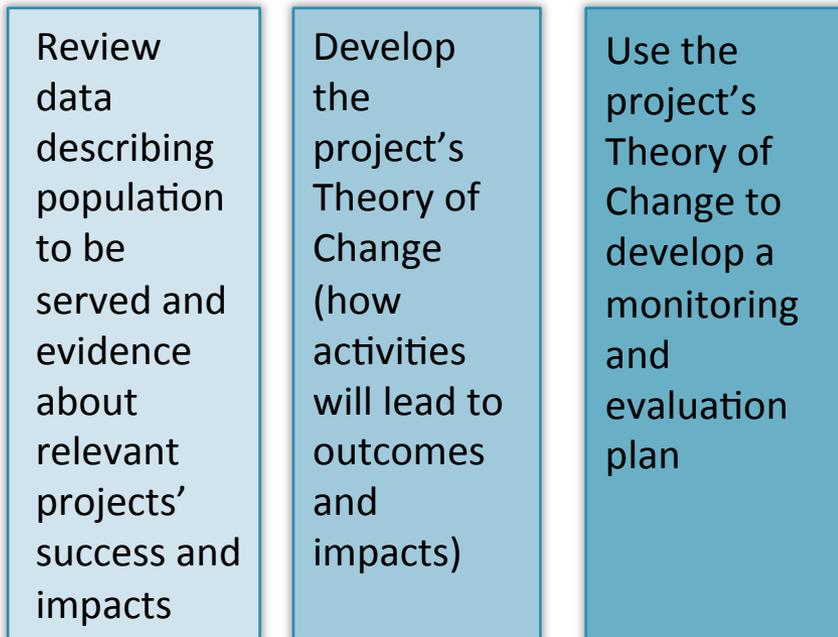
Connecting the project planning and M&E processes using a Theory of Change



Use lessons learned to improve the design of current and future projects

Goal: Design project that is informed by evidence-based assessment of how activities will lead to long-term impacts in order to maximize positive social impacts

Goal: Monitor project activities and outcomes and evaluate progress towards long-term impacts



Project Design Phase

Project Implementation Phase

Project start

What are WFW's expectations?

- In the CHIG application:

Describe the project's Theory of Change + M&E plan based on it

- This **brief** description of the M&E plan will include:

(1) indicators/evidence for tracking activities, outcomes, and impacts

(2) data you will use to measure each indicator

(3) how you will gather this data

What are WFW's expectations?

- During project implementation:
 - Report progress on activities and outcomes every 6 months
 - At close of funding cycle, evaluate progress towards long-term impacts, identify lessons learned, and note how you will incorporate these lessons into the design of future projects
- 6-month progress reports will cover:
 - Activities and Outcomes data
 - Any challenges you've encountered
 - Any course corrections you've made to your Theory of Change/ project plans as a result

What are WFW's expectations?

- *Strategic adaptation encouraged!*
 - Modify Theory of Change and project plans if need be
- *Incorporation of M&E not meant to be burdensome!*
 - Ideally, you are already collecting most of the relevant data – We are offering a framework (Theory of Change) for organizing and tracking this data in a systematic way
- *As all projects are unique, so are all M&E plans!*

How can the research team help?

- Kathleen and Lyndi will be available for support during the grant-writing phase (July-October) on developing your specific M&E plan
 - Check Theory of Change logic, develop indicators, offer methods for collecting additional data (if needed)