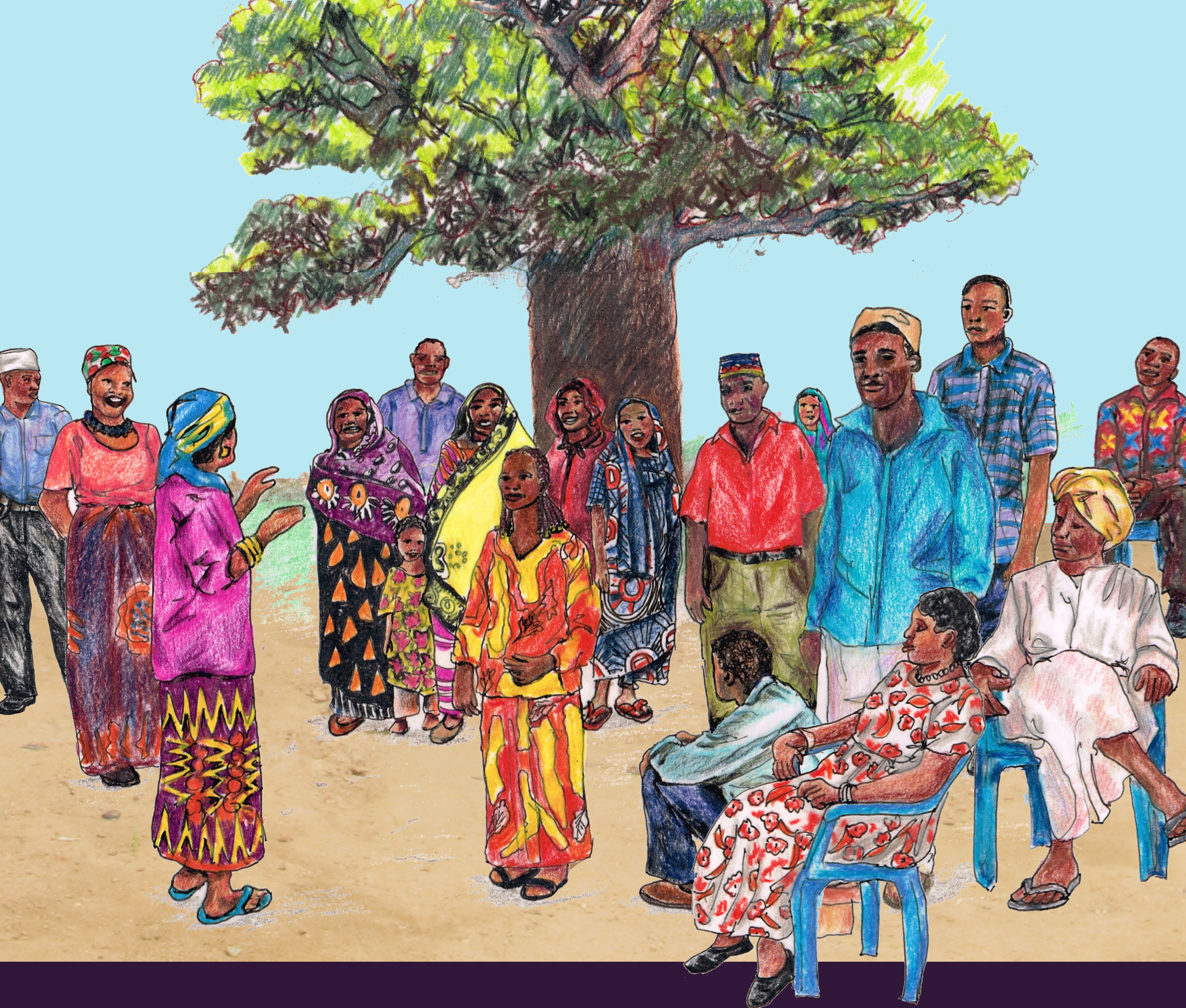

Participatory Monitoring & Evaluation in Tanzania's Health and Social Service Programs

Training Manual

January 2017

USAID
FROM THE AMERICAN PEOPLE

MEASURE Evaluation TZ

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Evaluation TZ

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This training manual was developed as part of an effort to build a participatory monitoring and evaluation (PM&E) programme for health and social services at the community level in the United Republic of Tanzania. It serves as a toolkit of useful PM&E techniques for improving the performance and impact of community-based interventions, such as those involving the most vulnerable children (MVC), home-based care (HBC), and gender-based violence (GBV).

The manual draws from the literature on participatory approaches and effective M&E practices in several geographical contexts, which are noted in the references section at the end. The manual also reflects the practical experiences and recommendations of local and international stakeholders, such as programme managers, field officers, community leaders, representatives of international nongovernmental organisations, and officials from the Ministry of Health, Community Development, Gender, Elderly, and Children (MOHCDGEC), and the Department of Social Welfare (DSW), Tanzania. We specifically wish to acknowledge the contributions of Eliwanzita Mtebe, Department of Social Welfare, and Bernard Swai, National AIDS Control Program, and others from the implementing partners, who field-tested the curriculum in Mbeya City April 11–14, 2016.

We are especially grateful to the staff, health service providers, and volunteers from Kikundi cha Huduma Majumbani Mbeya* (KIHUMBE), whose insights and contributions enhanced this manual.

*In English, Mbeya home-based service providers' group

CONTENTS

ABBREVIATIONS

CBO	community-based organisation
CHH	child-headed household
COP	country operational plan
CTV	community trace and verify tool
DQA	data quality assessment
DSW	Department of Social Welfare
FHH	female-headed household
FY	fiscal year
GBV	gender-based violence
HBC	home-based care
IP	implementing partner
M&E	monitoring and evaluation
MOH	Ministry of Health
MOHC-DGEC	Ministry of Health, Community Development, Gender, Elderly, and Children
MVC	most vulnerable children
MVCC	most vulnerable children's committee
NGO	nongovernmental organisation
OGAC	Office of the Global AIDS Coordinator
PEPFAR	President's Emergency Plan for AIDS Relief
PM&E	participatory monitoring and evaluation
PSS	psychosocial support
SI	strategic information
USAID	United States Agency for International Development

INTRODUCTION

BACKGROUND

Timely and reliable programme performance data are essential for reporting, accountability, and decision making. Under the United States President's Emergency Plan for AIDS Relief (PEPFAR), MEASURE Evaluation staff have been working to strengthen strategic information (SI) systems and human capacity in monitoring and evaluation (M&E) of PEPFAR/U.S. Agency for International Development (USAID) implementing partners (IP) in Tanzania.

We use data quality assessment (DQA) and M&E plan assessment tools to identify the strengths and weaknesses of partners' data management systems. Then we address identified weaknesses through targeted capacity-building assistance.

Community-based services present special strategic information challenges. First, these systems are less structured and more flexible than facility-based services. Second, while DQA can verify whether records are in place to support the reported results, it does not track back to the actual programme recipients themselves. To address this limitation, MEASURE Evaluation developed the community trace and verify tool (CTV) for community-based organisations that provide services to most vulnerable children (MVC). The CTV involves visiting MVC households to inquire about children's status and the services received. This tool can be applied to a sample of MVC listed in the community to determine coverage or a sample of MVC listed in the service registers to determine accuracy of reporting. However, the CTV cannot be used alone to inform the quality of services provided. That requires comprehensive M&E.

Organised workshops and one-on-one mentoring can build organisational and individual M&E skills. We also recommend strengthening routine programme supervision to include comprehensive M&E issues. This is in line with recent guidance from the Office of the Global AIDS Coordinator (OGAC), which considers supportive supervision a key activity in promoting data quality and data use (*FY2010 COP Technical Considerations*, 2009). In addition, we propose complementing assistance to service providers with special attention to programme beneficiaries through participatory monitoring and evaluation (PM&E).

Data quality assessment and the CTV tool are useful for strengthening capacity, data quality, and timely programme information that can be used for supply-side programme decision making (involving service providers). However, neither the DQA nor the CTV assesses the demand side (target population), nor do they encourage data use at the community level or joint decision making involving target populations and service providers.

For these reasons, MEASURE Evaluation developed a PM&E programme that will not only address the identified gaps in data quality and evidence-informed decision making on the supply side but also strengthen the demand side and provide strong direct linkages between program beneficiaries and direct service providers and on up to higher levels of technical and resources support providers: donors and implementing partners/international nongovernmental organisations (NGOs). We hope that implementation of the PM&E program will enhance the well-being of the children and the performance of the service providers. We also hope that the PM&E programme will enhance the supervision and management practices of the technical and resource providers.

MANUAL CONTENTS

This training manual contains session guides and reference notes for use in the PM&E training and in the application of this approach by PM&E facilitators in the field. (A slide presentation accompanies the manual.) The training sessions focus on PM&E concepts, methods, and tools to be used with beneficiaries and providers at the community level. The manual is based on MEASURE Evaluation Tanzania's experience in building PM&E skills at NGOs working in health and social service programmes. These materials also may be used for other audiences.

In addition, MEASURE Evaluation has developed a PM&E field manual for distribution to all training participants. Separate materials are available for providers of technical support.

MANUAL STRUCTURE

This training manual covers four instruction sessions, each with specific learning objectives, instructional content, and activities. The manual is designed to help training participants:

- Understand the overall concept of participatory monitoring and evaluation
- Learn how to apply PM&E methods and implement PM&E tools
- Gain confidence in their ability to undertake PM&E programming with community groups

WHO IS THIS TRAINING MANUAL FOR?

This manual is specifically designed to train direct service providers who aim to apply the participatory methods for community-based stakeholders in health and social services programmes in Tanzania. The trainers do not have to be professional M&E experts. They do need, however, to have basic skills, experience, and commitment to participatory training methods and basic knowledge about project management and planning, as well as the programme implementation environment in Tanzania.

HOW TO USE THE MANUAL

All sessions are designed to help trainers to employ meaningful discussion and practice using diverse participatory methods. Sessions are organised by modules. Every session begins with an overview and includes instructions and talking points. Instructions for the trainer are to be read in preparation for leading the module. Talking points (in boldface type) suggest language for the trainers to use when they lead the module.

The manual employs the following methods:

Brainstorming: Participants share ideas by responding to open-ended questions that draw on their knowledge and experience.

Group discussions: Participants share knowledge, skills, and experiences related to the training theme. They may discuss key issues as one large group or as part of smaller groups that report back to the larger group. Sample questions are provided to help trainers encourage and guide discussion about key concepts.

Presentations: Participants learn to train others by practicing, in this case giving a brief presentation to enhance understanding of a key concept.

Large group practice: Participants practice applying new knowledge with a large group. This provides the opportunity to transform knowledge into a skill set.

Small-group sessions: Participants break into smaller groups to discuss and share new knowledge with each other, working in teams to delve more deeply into a concept. They then present their team work to the larger group. Such opportunities to teach one another can facilitate retention of a new concept or skill.

SESSION 1.
INTRODUCTION TO PARTICIPATORY MONITORING AND EVALUATION

OVERVIEW

In this session you will introduce key information about participatory monitoring and evaluation (PM&E), highlight opportunities for stakeholder engagement, and describe the processes involved in preparing community-based organisations, such as most vulnerable children committees (MVCCs), to use PM&E to strengthen their services. You will cover the five basic steps in PM&E, and guide participants on how to organise and carry out activities to support community action and learning.

LEARNING OBJECTIVES

By the end of the session, participants should be able to do the following tasks:

- Define these terms: participatory, monitoring, and evaluation.
- Use a simple M&E model to describe programme progress.
- Describe the role of participation in PM&E.
- Understand how to use the Programme Path.

SESSION OUTLINE

Module 1: What Is Participatory Monitoring and Evaluation (PM&E)? Lead the participants in a brainstorming session on the meaning of these terms: participatory, monitoring, and evaluation.

Module 2: How Can a Simple M&E Model Be Used to Tell a Story? Introduce M&E concepts using an M&E model, programme goals, and indicators.

Module 3: What Are the Benefits of Adding a Participatory Approach to Traditional M&E? Introduce a case study of an a vulnerable child receiving services. Apply the M&E model to the case study**.**

Module 4: What Is the PM&E Programme Path? Describe the five steps of the PM&E Programme Path, and the preparations that need to be made before each step. Explain how these steps can be taken through a series of meetings and introduce the six PM&E tools that can be used to ensure success.

INSTRUCTIONS

- Bring flip chart, markers, masking tape, and photocopies of Case Study 1 (from Appendix B).
- Introduce yourself. Give your name and relevant professional/personal experience and educational background.
- Describe your current work and share your interest in the care of MVC.
- Introduce any other co-trainers.

- Explain the agenda for the day (PowerPoint Slide 3) and for the following three days (Slides 4–7).
- Note breaks, lunch time, bathroom locations, the location of a question box (where participants can deposit notes to the trainer), and evaluation forms.
- Describe each of the modules for the session (Slide 3).

Tips:

Stand at the door and greet participants as they enter.

Remember to smile.

SESSION 1. MODULE 1.
WHAT IS PM&E?

INSTRUCTIONS

Introduce the concept of brainstorming. Use the talking points (shown in text boxes) to describe what brainstorming entails. Have a flip chart and markers ready so you can take notes during the brainstorming.

Brainstorming is a group activity. First, the group lists ideas, examples, or definitions.

No ideas are wrong. All ideas are welcome.

The group then uses the ideas to solve a problem.

Let's go through each of these terms separately and see if we can come to a clear understanding of what "participatory monitoring & evaluation" means.

We'll start with "participation" and then move on to "monitoring" and "evaluation."

Then we can come to our own understanding of what's special about participatory monitoring & evaluation.

Lead a brainstorming session about participation (see the talking points below).

Refer to Appendix A for additional notes on the concepts of participation, monitoring, and evaluation. You should capture comments on a flip chart. Do not show Slides 9–11 until the group has had a chance to brainstorm their own ideas.

What is participation?

What do you think about when you hear the word participation?

PARTICIPATION

- Taking part in a joint activity.
- Sharing different experiences, capabilities, and knowledge with one another.
- Listening, learning, asking questions, and showing respect for all persons involved
- Community power

Lead a brainstorming session about the concepts of "monitoring" and "evaluation."

What does "monitoring" mean?

What does "evaluation" mean?

Can someone give an example?

Is your example "monitoring" or "evaluation"? Why?

What does "monitoring and evaluation" (or "M&E") mean?

Can someone give me another example of M&E?

Monitoring

- Watching
- Checking
- Measuring
- Observing
- Counting
- Looking for changes
- Gathering information
- Tracking progress day to day

Evaluation

- Assessing
- Reflecting
- Analysing
- Learning
- Making comparisons
- Telling a story
- There is a beginning and an end

Facilitate a group discussion about participatory monitoring and evaluation.

What do you think "participatory monitoring and evaluation" means?

How might participatory monitoring and evaluation be different from traditional M&E?

PARTICIPATORY MONITORING AND EVALUATION

Participatory M&E means engaging and empowering communities through shared control, joint learning, and ongoing reflection, in order to better respond to concerns, improve progress, and achieve desired goals.

SESSION 1. MODULE 2.

HOW CAN A SIMPLE M&E MODEL BE USED TO TELL A STORY

INSTRUCTIONS

Introduce a simple M&E model in a presentation. Draw it on the flip chart using simple boxes and arrows. (See Figure 1 or Slide 12.)

An input is any resource, such as money, materials, time, or people, necessary to conduct an activity.

An activity is an action completed by someone—for example beneficiaries or providers.

An output is a product resulting from one or several activities.

An outcome is the needed change in the lives of beneficiaries that has occurred.

Figure 1. Simple M&E model

Inputs ⇨ Activity ⇨ Output ⇨ Outcomes

Use an example to show how the M&E model can be used to tell a story about a family in need of nutritious food. (See Figure 2 or Slide 13.)

If you were to ask a family in need of nutritious food how they would like to address their concern, they might suggest that they use their backyard for gardening.

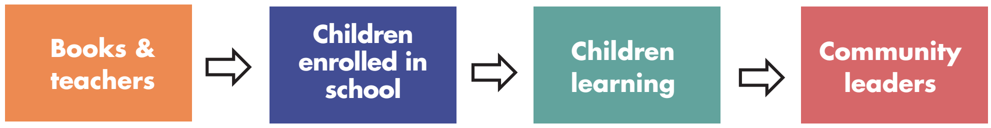
Figure 2. M&E model for a family in need of nutritious food

Seeds ⇨ Planting & watering ⇨ Plants with fruits & vegetables ⇨ Fruit & vegetables for the family

Now ask the group to tell a story about supporting a better future for the vulnerable children in their community. (See Figure 3 or Slide 14.)

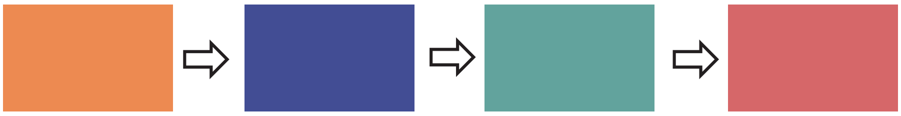
If a community wanted to support a better future for vulnerable children, some of the members of the community might say that they could achieve this goal by supporting education for most vulnerable children.

Figure 3. M&E model for most vulnerable children



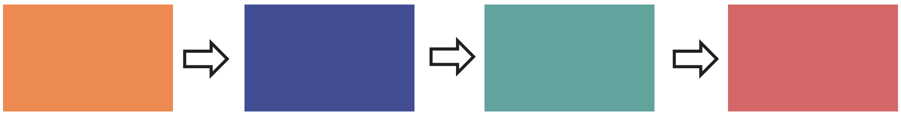
Large group practice: Provide a blank M&E model (pictured below) and ask participants to tell a story together.

Figure 4. Blank M&E model



Small-group breakout session: Divide the participants into small groups to practice using the M&E model to tell a story that relates to their community programme work. Small groups will share their story with the larger group. (See Figure 5 or Slide 15).

Figure 5. Blank M&E model



Tips:
Developing a simple M&E model is not easy! Encourage the group with these suggestions:

- Developing an M&E model can take a long time. It is not possible to make a perfect model the first try.
- Developing an M&E model takes group consensus and mutual understanding.
- Agreeing on the problem first will help you decide if you have identified the right inputs, activities, outputs, and outcomes.

Introduce **goal statements** in a presentation (Slide 16).

Goal statements clearly describe what you want to achieve.
It is very important for goal statements to be:

Specific

Measureable

Time-bound

Present strong and weak goal statements for the M&E models or stories provided earlier. Table 1 (Slide 17) shows two examples:

Table 1. Strong and weak goal statements

Strong Goal Statements	Weak Goal Statements
Increase the number of meals where the family eats fruit and vegetables **this year.**	Provide nutritious food for the family.
Increase the number of children getting an education **this year.**	Strengthen school attendance.

Use the first example to explain the properties of a strong goal statement (measurable, specific, and time-bound).

"Increase the number" allows for measurement.

"Meals where the family eats fruit and vegetables" is more specific than "nutritious meals."

"This year" is time-bound.

Large group practice: Ask participants to list goals that relate to their earlier M&E models/stories. Sort them into "weak" and "strong" goal statements. Allow the group to strengthen goal statements. Ask volunteers to identify specific, measurable, and time-bound properties in other goal statements. Then, introduce the concept of indicators in a group discussion (see Slides 18 and 19).

Has anyone heard of indicators? What are indicators?

An indicator may be a fact, such as the weight of a child. You can measure the weight and note changes over time.

An indicator might also be an opinion or feeling. A mother could tell you that she was satisfied with her experience at the antenatal care clinic or a child could say that he or she feels proud to receive uniforms to attend school.

Can you think of other examples? Why should we use indicators?

Indicator

A signal that helps us to identify change

A detail in a story

A good indicator is very specific and practical to measure

Present an example to explain how indicators are used to provide the details of your story (see Slide 20).

Let's use a real-life example. When we cook rice for ourselves and our families, we monitor how the rice cooks to be sure that it is cooked well and tastes good.

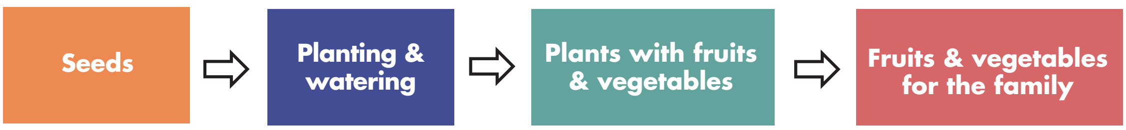
First, we gather our resources or inputs: the water, pot, uncooked rice, and salt. We add water to the pot and set the fire. These are our activities. Then we monitor these processes to see when the water boils. Good indicators that the water has boiled are the bubbles and steam rising from the water. This tells us that we can add our rice.

When we add our rice to the boiling water, it gets softer over time; this is an output. We monitor this change using indicators, to determine whether our rice has been cooked well. Our indicators could be that the grain is soft and the taste is good. Once this happens, we have reached our outcome: we have rice to eat.

Continue to use the earlier M&E models or stories and ask the group to build more details into the story. Present the example of the family in need of nutritious food (Figure 6/Slide 20 again). Examples are provided if the group needs help.

Let's bring everything we have learned together. What is a strong goal statement for this M&E model? What indicators or details to the story can we add to this M&E model?

Figure 6. M&E model of a family in need of nutritious food, with goal statement and indicators



Goal: Increase the number of meals at which the family eats fruit and vegetables **this year.**

o The number of seeds bought by the family this year

o

o The number of days the family tended the garden this year

o

o The number of plants that produced fruit or vegetables this year

o

o The number of family meals with fruit or vegetables this year

o

Remind the group that all indicators do not need to be counts. Explain that indicators can also be used to track the quality of something or how someone feels. Use the example with the family to show how quality indicators could also add important details to the story.

Fill in one or two of the blank bullets in the list below Figure 6, using the dimensions of quality for community-based programs and the questions below.

All indicators do not need to be indicators that count a product. They can also be used to let us know about the quality of the product or how someone feels about the product. For example, if the rice in the example tasted good, then we know that it was cooked well. On the other hand, if those who ate the rice did not enjoy it and felt it was too salty, we would add less salt next time.

Quality indicators collect information about the following:

- Responsiveness: Is the product or service what you asked for in the time you asked for it?
- Usefulness: Does the product or service address your concerns?
- Reliability: Do you receive the product or service the same way at the same time every time?
- Confidence: Can you rely on your ability or the ability of the provider?
- Safety: Is the product or service provided in a safe environment or in a safe manner?
- Empathy: Is the product or service provided in a way that makes you feel understood and cared about?

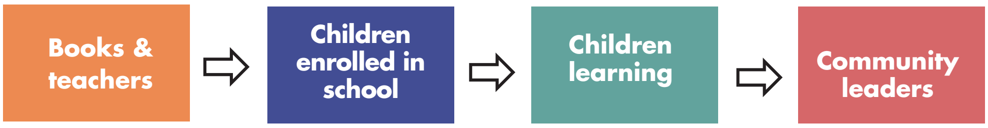
Let's add quality indicators to the M&E model. Consider these issues:

- How difficult is it to get enough of the type of seeds the family wants to grow?
- Does every family member get to eat fruits and vegetables at the meal?
- Was the family able to plant and water as planned?
- How confident is the family about their ability to take care of the garden?
- Is the soil, fertilizer, or water safe to use in the garden?
- Did the family members enjoy eating the fruits and vegetables they added to their meals?

Continue the large-group discussion, using the M&E model concerning MVC needing education (Figure 7; Slide 21). Ask participants to fill in the details of the earlier story. Example "details" are provided below, if the group needs help.

We can try it again with the MVC model.

Figure 7. M&E model for most vulnerable children with goal statement and indicators



Goal: **Increase the number** of children who become community leaders **in the next five years.**

o The number of teachers available each year

o

o The number of children enrolled each year

o

o The number of children who advanced to the next level each year

o

o The number of children who graduated school and stayed in the community in the last five years

o

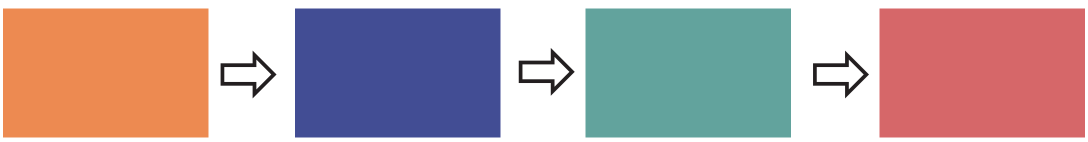
Now let's add one or two quality indicators. Consider these issues as you add these indicators.

- Do we know what children and caregivers need to allow for school enrollment?
- Why do books help children enroll in school?
- Which subjects are taught to the children each year?
- What is the dropout rate for girls? For boys?
- Why do children drop out of school?
- Why do successful children leave the community?

Continue the large-group discussion. Once the group has completed both M&E models with goals and indicators, point out the differences in the two stories and their details. For example, one story focuses on a household. The other focuses on the community. One story covers one year and measures progress over that year. One story covers five years and measures progress each year and at the end of five years. Make observations for the group: How are the goal statements different? How are the indicators different?

Small-group breakout session: Ask the participants to break out into their previous groups and revisit their stories using a simple M&E model. Ask the groups to write a strong goal statement for their story and add details (indicators) for the story, using the M&E model (Figure 8; Slide 22). There should be one detail or indicator for each box, and at least one indicator addressing quality, for a total of at least five indicators.

Figure 8. Blank M&E model with goal statement and indicators



Strong goal statement:

- o
- o
- o
- o

In a summary presentation, explain how indicators are selected in PM&E.

We use indicators in our daily lives, such as when we talk about how we cook tasty rice.

We monitor and evaluate our inputs, activities, and outputs at work in the same way, choosing indicators based on what we want to know and what we expect to change.

There is no right answer on which indicator to choose. Use your own judgment and relate it as closely as possible to the input, activity, output, or outcome.

If you choose people-related indicators, remember to separate people at least by gender, and then by age, location, or other dimensions that make sense. This is important, because people are not the same, and depending on their gender, age, and other background characteristics, their situations may differ.

SESSION 1. MODULE 3.

WHAT ARE THE BENEFITS OF ADDING A PARTICIPATORY APPROACH TO TRADITIONAL M&E?

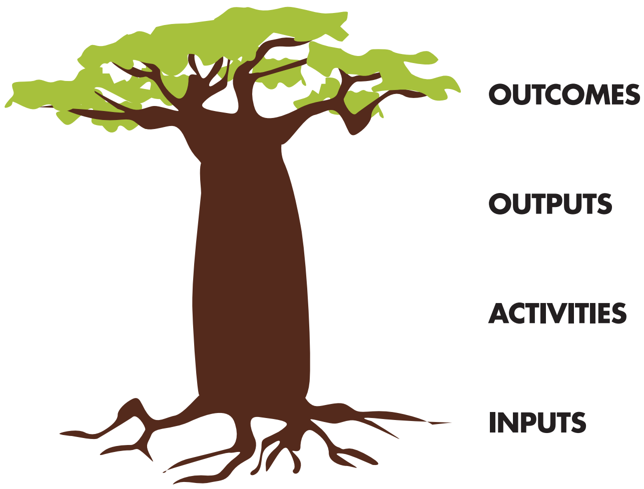
INSTRUCTIONS

Present a second way to express the M&E model. Draw a large tree on the flip chart (see Figure 9; Slide 23). Be sure to include roots at the bottom. To reinforce the M&E model, discuss how the tree grows and produces fruit.

Let's look again at the M&E model (Figure 1/Slide 12).

When we first looked at this model, we described how inputs might allow us to conduct activities, how activities help to produce outputs, and how outputs help us to achieve outcomes.

Figure 9. Tree M&E model



Remind participants that we can use elements of the M&E model to help us understand whether we are achieving the outcomes we want.

Small-group breakout sessions. Read Case Study 1 aloud to the large group. (See the following box or Slide 24). Then divide the participants into small groups to practice using the tree M&E model to tell Rehema's story. Distribute a copy of the case study and one sheet of flip-chart paper to each small group. Participants will draw a tree; identify inputs, activities, outputs, and outcomes from the case study, and write them next to the tree. Small groups will share their work with the larger group.

CASE STUDY 1.
SUPPORTING A SECOND CHANCE FOR REHEMA

Orphaned at the age of five, Rehema dropped out of school to work around the house and in the field. Now, at 11 years of age, Rehema cannot read or write, lacks confidence, and is embarrassed about not having education.

Rehema is identified as a vulnerable child, through the work of community groups. The community groups help with uniforms, socks, and books to support Rehema's enrolment in school. In addition to education and learning, the school teaches sewing and encourages participation in sports such as netball.

Rehema learns to read and write at school. She also learns to sew, and takes part in netball after school. These activities help her to develop self-confidence, so that she can speak out and express herself in front of people.

Rehema becomes a leader in her school. She applies her new confidence to netball and becomes a national champion. She also becomes a role model in her village. She uses her sewing skills to earn extra income. She also helps other vulnerable children in her village and teaches them to read and write.

Facilitate a discussion on how the participatory approach was used to help achieve the desired goal.

TIP: This discussion should help participants think through the effects and benefits of using a participatory approach to M&E. Important points are the benefits of involving others, especially those affected.

Can someone give me an example of a strong goal statement for this case? Was the desired outcome achieved? Why?

What might the community groups have done to support Rehema's enrolment in school? Who might have been involved?

How would the community groups know what inputs were needed? How might they know that Rehema became more confident?

Tell the happy story of how community group members were able to support a second chance for Rehema.

Use the tree M&E model to guide the explanation.

Let's keep using the tree as a guide (Figure 9 or Slide 23).

We'll start with the roots. These are our inputs. They include the community groups, the uniforms, socks, and other materials to support Rehema's enrolment in school.

From the roots, we have the tree trunk and the branches. These are our activities: the people and materials used to get Rehema enrolled in school and to help her get an education.

Next, we have the leaves. These are the outputs: the results of Rehema getting an education. They include her learning to read and write, her sewing skills, her confidence, and her participation in netball.

Finally, we get to the fruit. Our outcome is a confident Rehema who takes care of herself and gives back to her community.

Wrap up with a summary on PM&E approaches.

PM&E involves groups and not individuals.

The participatory approaches are not meant to replace traditional M&E methods but rather to complement them.

PM&E involves groups of local people coming together to discuss their own concerns and decide how they can best improve them.

SESSION 1. MODULE 4.
WHAT IS THE PM&E PROGRAMME PATH?

INSTRUCTIONS

Review basic M&E concepts.

Monitoring is about observing our work and tracking it day to day. We monitor our work by gathering and recording information over time.

Evaluation is about learning. We evaluate our work by reflecting together on what has been done and assessing our progress thus far.

Explain that good PM&E involves reflection and revision. Emphasise that change is okay.

PM&E is about learning something by doing it together.

Change IS okay, if we have learned something new.

We discussed goal statements and indicators to monitor the outcomes we want. We are able to make changes to those goal statements and indicators, if it makes our story stronger.

Draw the PM&E Programme Path on the flip chart (see Figure 10; Slide 25).

Figure 10. PM&E Programme Path*

Use the diagram to illustrate the purpose of PM&E and present PM&E as a learning cycle, starting with the present and planning for the future.

*Source: Evans, K., Larson, A., Mwangi, E., Cronkleton, P., Maravanyika, T., Hernandez, X., . . .Banana, A. (2014). *Field guide to adaptive collaborative management and improving women's participation.* Bogor Barat, Indonesia: Center for International Forestry Research (CIFOR). Retrieved from: http://www.cifor.org/publications/pdf_files/Books/ACMManual2014.pdf. Adapted from Colfer, C.J.P. (2005). *The complex forest: Community, uncertainty, and adaptive collaborative management.* Washington, DC: Resources for the Future/Center for International Forestry Research.

PM&E is about learning together from our successes, challenges, and mistakes. First, communities come together to discuss present concerns. They make a plan of action to address these concerns and they carry out activities to support this plan.

Then they meet again to discuss their activities and their observations. Based on this meeting and group reflection, they may change some of their plans in order to take better action and make better progress in the future.

This process of monitoring, reflection, and taking new action is repeated as many times as is necessary to bring communities closer to their goals.

Introduce the five steps of the PM&E Programme Path. You can either build on the initial PM&E Programme Path sketch from the flip chart, or draw a new detailed diagram (see Figure 11; Slide 26).

Figure 11. Detailed PM&E Programme Path

Explain that each PM&E step will require facilitated meetings with relevant members of the community or community groups. Each step will also require some preparation and follow-up afterwards by the PM&E facilitator.

TIPS: Use the talking-point prompts (in bold) to guide the discussion. Feel free to use a particular area and/or programme for this module. Note important points about the PM&E Programme Path on the flip chart sketch.

PM&E involves both visual representation and verbal communication. It is best carried out through the use of varied tools (such as maps, tables, and graphs) and the support of a trained facilitator.

Before Step 1. Keep in mind that programme activities are already underway before a community group uses the PM&E Programme Path.

STEP 1. GET READY

This is about entering the community to prepare both villages and community groups for PM&E activities.

Before you start working in a community, you should engage with that community to gather some general knowledge about their needs and get their buy-in for PM&E. That's why the first step involves raising community awareness about PM&E activities and getting support.

Do you think this is important? Why? Why not?

Ask participants to brainstorm the preparations and activities for **Step 1 (Get Ready).**

How could you prepare the community for PM&E? Are there particular people, leaders, or organisations who could help? What could you do to involve them?

How would you bring the community together? Would you call a meeting? Would one meeting be enough? How would you make the community aware of the purpose, location, or timing of the meeting? Are there any people who might be overlooked, or who might not attend the meeting(s)? What could you do to reach them?

Before conducting these meetings, what are some things you need to do? Who should be involved? Why? What will be discussed at the meetings?

What do we do next? Are there activity reports or plans that you should gather or read before you start working in the community?

STEP 2. IDENTIFY PRIORITIES

This step involves getting the people who work or volunteer with community groups to think about the concerns in their community, discuss these issues with one another, and decide how they *would like* to address the concerns identified (Slide 27).

The second step is about getting the people who work or volunteer with community groups to think about what the community needs and how they can help.

This step involves meeting to talk about the community concerns; discussing what you would like to change; agreeing on which concerns are most important, and which you could help change; and then deciding on the order in which you will address the concerns identified.

Brainstorm what **Step 2 (Identify Priorities)** might look like.

How will you know what the concerns are? How will you decide which ones are most important? In Session 2, we will introduce some tools you could use (Community Concerns Brainstorm and the Vulnerability Map).

Let's talk now about some things we need to do to help us to identify priorities. Whom should we involve?

What should we have completed by the end of the meeting? What do we do next?

TIPS: Note the main points of this step on the Programme Path Diagram (see Figure 11; Slide 26 again), before moving on. Be sure to wrap up each step by noting the people who should be involved and the tools you could use.

STEP 3. MAKE A PLAN

At this stage, the same people who work or volunteer with community groups should come to a decision and make a plan of action to address the issues they have identified (Slide 28).

The third step is about coming to a decision about how you will address the issues identified.

Once you identify the community concerns, you will need a plan of action for how you will provide needed services and monitor changes in the community as a result of having received these services.

Brainstorm what **Step 3 (Make a Plan)** might look like.

What are some things we need to do? What activities might our plan include? Who will do them?

What information might we need to record? In Session 2, we will show you some tools you can use to make a detailed plan (the Action Calendar and the Community Monitoring Table).

What should we have completed by the end of the meeting? What do we do next?

STEP 4. TAKE ACTION, THEN MONITOR AND REFLECT

This step involves community groups going out to the villages to carry out the activities planned in Step 3, and then coming back together to meet and discuss the successes, challenges, or other observations that they noticed while working in the community (Slide 29).

The fourth step has two parts.

This first part is about taking action. This is where you go out to the villages to carry out the activities described in your plan (and more fully in the Programme Action Calendar and Community Monitoring Table, two tools we will introduce in Session 2).

The second part is about monitoring and reflection. This is where members meet with each other to discuss their activities and observations.

Brainstorm what Step 4 (Take Action, then Monitor and Reflect) might look like.

How many meetings do you think we might need for this step? Before the meetings, should we have completed any activities? Is this important? Why? How will we discuss what we have learnt?

We could discuss and reflect on the information in the Community Monitoring Table, or we could use a Community Scorecard or a Single Case Review. After we have recorded information three or four times using our Monitoring Tables or our Community Scorecards, we may need to tally the information, reflect or interpret the information, and develop questions for the community group.

Is it okay to make changes to the plan? How do we record this? We will introduce useful tools in Session 2 that will help you gather and record even more details for your plan (the Action Calendar, Community Monitoring Table, and Community Scorecard). What should we have completed by the end of the meeting? What do we do next?

STEP 5. TAKE NEW ACTION, THEN MONITOR AND REFLECT AGAIN

Once action has been taken, monitoring activities have been performed, and the group has met to reflect on their work, this cycle is repeated to improve on programme plans and help groups to achieve their goal(s). This step involves NEW action, along with regular monitoring and reflection, and will most likely need to be repeated (Slide 30).

The fifth step is very much like Step 4. The processes are the same. The only difference is you. Now, you can use what you have learned to improve on programme plans and activities through new action, monitoring, and reflection.

Brainstorm what **Step 5 (Take New Action, then Monitor and Reflect Again)** might look like. Remind participants that this step is to be repeated until they have achieved their goal(s).

This is a very important step in PM&E. Remember that PM&E is about learning together from our successes and our mistakes. Change is okay. Therefore, this step of taking new action, monitoring, and reflection should be repeated as many times as needed to bring communities closer to their goals. For some activities, this may be the last step of the PM&E process. Can you think of any examples where this might be so?

It is more likely that more than one follow-up meeting will be needed and this step will be repeated continually until the goal is reached.

What tools could we use at this meeting? Do you think the tools will be different from those in Step 4? Why?

If change is okay, can we revise the plan if we have ideas to make it better? Can we add new activities? Can we remove activities? How do we record this? What should we have completed by the end of the meeting? What do we do next?

We will talk more about action, monitoring, and reflection in Session 3.

Closing/Key Points

- **Participation** should include everyone involved in and affected by the intervention.
- A simple **M&E** model includes **inputs** that allow us to conduct **activities**, which in turn allows us to produce **outputs,** which helps us to achieve our **outcomes**.
- PM&E is a process that allows groups of local people to learn with, and from, one another. They do this by analysing their concerns, making decisions on how a situation can be improved, presenting their results, and owning their outcomes. There are five mains steps in PM&E:
    - Get ready.
    - Identify priorities.
    - Make a plan.
    - Take action, then monitor and reflect.
    - Take new action, then monitor and reflect again.
- **Change is okay.** When we change our plans based on lessons learned, we get closer to achieving our goals.

SESSION 2.
PM&E COMMUNITY GROUP TOOLS

For 20 participants

For 10 participants

OVERVIEW

In this session you will introduce six PM&E tools and show participants how to use them with community groups to improve programmes (Slide 31). While programme reports are important to show results to donors and managers, they are not necessarily helpful to the programme recipients themselves. These PM&E tools can be used by community groups, such as most vulnerable children committees (MVCCs), with the help of a PM&E facilitator. The tools are valuable, because they can be used to help community groups understand which services are needed, which resources exist, and whether community members receive the services they identify as needed. The tools also help community groups learn about community members' perceptions of how well the services are addressing community needs. Gathering this information will allow community groups and other stakeholders to understand whether or not programmes are changing the lives of programme recipients for the better.

The PM&E tools may be used as a unit to guide the MVCC or other community group through a comprehensive PM&E programme, or they can be used one at a time to address a specific need. The tools were briefly introduced with the Programme Path in Session 1, Module 4. The Programme Path has five steps. Step One involves getting to know community stakeholders and raising awareness about PM&E. This does not require a tool, just good community outreach skills and strong understanding of why PM&E is valuable. Step Two involves working with the community group to identify priorities using the Vulnerability Map and the Community Concerns Brainstorm tools to understand their resources and needs. Step Three involves making a plan using the Action Calendar. Step Four involves community groups taking action and then coming back together to discuss successes, challenges, or other observations using one or more of the following tools: Community Monitoring Table (service delivery), Community Scorecard (client satisfaction), and Single Case Review (service quality.) Step Five provides the community group the opportunity to make course corrections, take new action, or continue along with successful programme action, monitoring, and reflection.

LEARNING OBJECTIVES

By the end of the session, participants should be able to do the following:

- Explain the purpose of each community group tool.
- Explain how to perform the necessary steps required to use each tool.

SESSION OUTLINE

Community group tools will be introduced in six practical modules, one tool per module. Trainer participants will work together to use the tools to role-play the following activities:

Module 1. Vulnerability Map: Map households and resources in the community and identify vulnerable households.

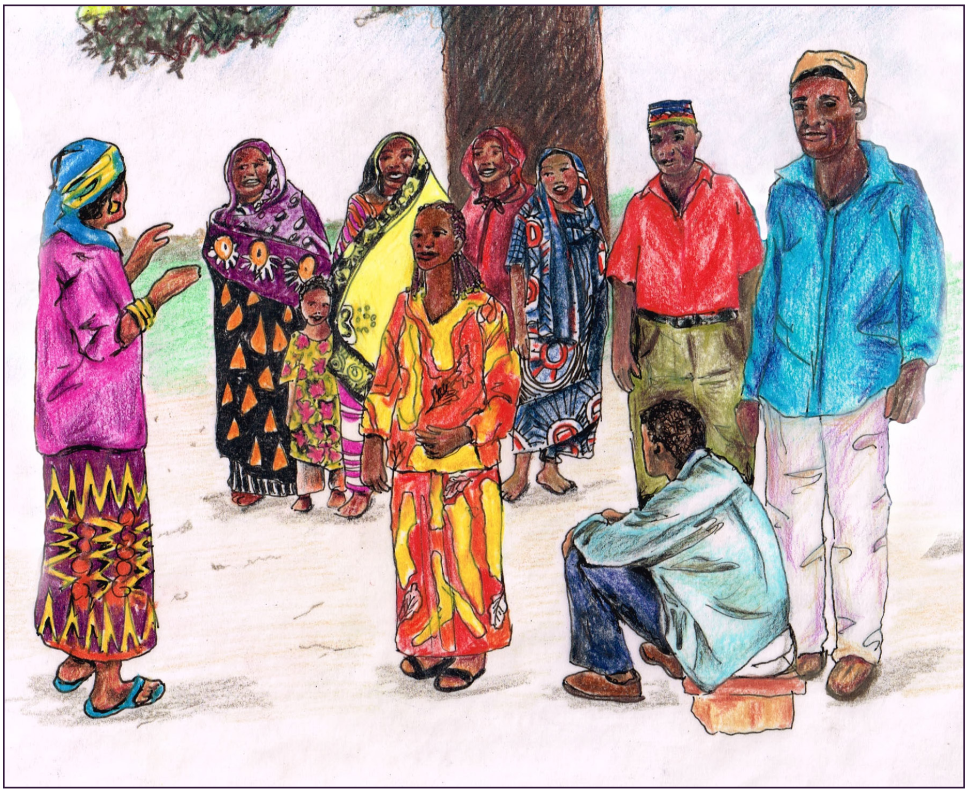
Module 2. Community Concerns Brainstorm: Gather and prioritise issues that are of concern to the community programme.

Module 3. Action Calendar: Prioritise programme activities and set goals using a calendar.

Module 4. Community Monitoring Table: Monitor programme resources and activities.

Module 5. Community Scorecard: Monitor and evaluate quality service delivery with a series of community meetings.

Module 6: Single Case Review: Evaluate the quality of service delivery with one in-depth community group discussion.



INSTRUCTIONS

Bring a flip chart, markers, masking tape, nametags for role-play characters, emoticon faces for Community Scorecard, and copies of the PM&E facilitators' field manual.

Explain the learning objectives and modules that will make up the session.

Explain that the approach to Session 2 is to engage in a series of role-play exercises using a community programme with which everyone is familiar (Slide 32).

If the group has no more than 10 people, conduct the role-plays in one group. If the group has up to 20 people, conduct the role-plays in two groups and have the small groups report back to the larger group.

The easiest way to learn the PM&E tools is to use them. In this session, we will use the tools to role-play relevant activities that will be helpful in your communities. We can take turns playing the parts of PM&E facilitator, community service provider, and community group member.

Please refer to your field manual as we practice each tool.

Ask the group to come to an agreement on a community programme to use as a role-play example for Session 2's exercises. If possible, suggest a programme with which you are familiar.

Before we begin, let's decide which community we will use as our example. Would any one like to volunteer an example?

First, we need the name of the community, the organisations that work there, and the types of services provided. Think about the geographic area covered. Who will be a volunteer? Who will be a community leader? Who will be a beneficiary?

Next, we need to decide who will play which role in the community.

Now that we have decided that our group is from [insert name of community], we will move forward as if I am a PM&E facilitator and each of you are members of the community participating in the Vulnerability Map exercise.

Example Role Play Characters

1. Female elder with 4 orphans
2. MVC—child from child headed household
3. Volunteer—MVC
4. Member of MVCC
5. Representative from community women's group
6. Representative from village leadership
7. Volunteer—home-based care
8. Faith-based leader
9. Married woman—family with 2 kids
10. Married man—family with 4 kids
11. Field officer

SESSION 2. MODULE 1.

VULNERABILITY MAP

For 2 groups

For 1 group

INSTRUCTIONS

Begin the "Vulnerability Map" exercise by using the following talking points:

We are going to complete an exercise called "Vulnerability Map." The purpose of this exercise is to understand how different households survive and cope in the community.

Understanding different households will help us understand the needs and concerns of the entire community.

Has anyone participated in a community mapping exercise before? Tell us about it.

Facilitate a brief discussion about the different types of households in the community.

Before we begin, let's share with one another our ideas of what makes a household. What defines a household?

There are many different types of households that make one community. Tell me about different households.

Today we will draw a map that shows the community resources, such as a school, a health centre, or a river. We will also draw households on the map.

We will not draw all of the houses, but we will try to draw many different types of houses.

If the group is small (6–10 participants), they can stay together for the exercise.

If the group is large (more than 10 participants), form smaller groups of participants who have characteristics in common. For example, group the leaders with other leaders, providers with other providers, volunteers with other volunteers, and clients with other clients. Another example may be women with women and men with men. It is important to keep the community programme in mind when deciding how to form smaller groups.

Tip: If it is a large group, be sure the meeting space can accommodate breakout sessions. Be prepared to draw in the dirt with sticks if outside is the only place spacious enough to work.

If the participants break up into smaller groups, provide someone to play the role of a PM&E facilitator for each group. The PM&E facilitator will need to take notes during the discussion and copy the map.

Before the brainstorm begins, the group should reach an agreement about the geographic area and the types of services, resources, and organisations that should be considered.

Draw the Vulnerability Map together as a group. See Figure 12 or Slide 33 for an example.

Ask someone from the group to draw her household (on a sheet of paper, on a cement floor, or in the sand) and write the name next to the household.

Let the group draw any key features nearby in the village or community, such as a school, a health post, roads, paths, water sources, and shops.

Ask the person who drew the house to add the immediate neighbours' households with their names. Others can help them recall names and positions of households.

Let the person continue adding households until there are about 20–30 households (depending on the size of the community). Label each house with a number, starting with 1.

Keys for the map can be abbreviations or symbols, such as female-headed household (FHH, or a flower), child-headed household (CHH, or a small pebble), livestock (L, or a piece of dung), and poultry (P, or a feather).

Copy the map in a notebook. Take notes while the group discusses the answers to the questions below.

Before we begin, let's confirm the geographic area the programme covers. Can someone describe that for me? What is the boundary to the North? What is the boundary to the East? To the West? (Note on the flip chart.)

And, let's confirm the types of services offered by the programme and the key stakeholders in the community. Can someone list those for us? (List them on the flip chart.)

Okay let's start drawing the map. Who wants to draw? Please draw your house and then your neighbours' houses.

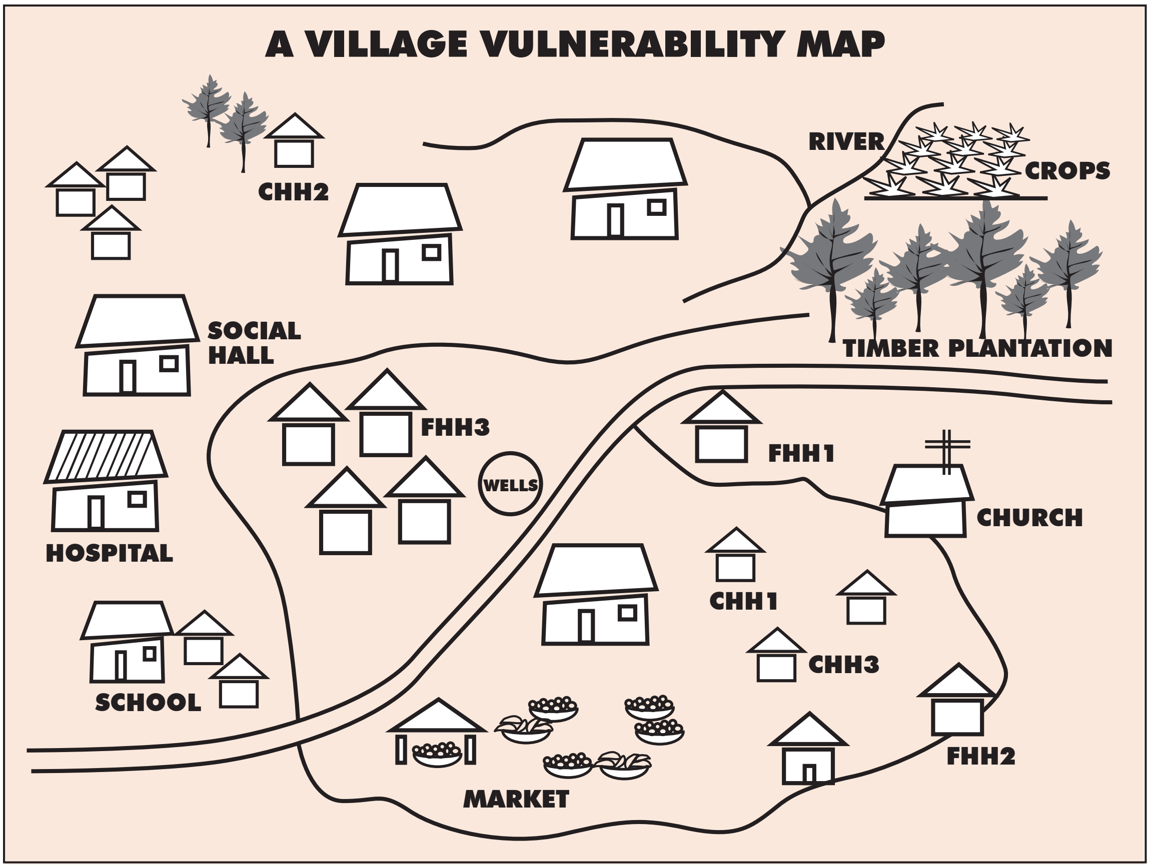
Where is the school? Where is the health centre? Can you draw roads and paths? Let's draw more houses. Let's draw gardens and livestock.

Can you list all types of households you have in your village (female-headed, child-headed, a household with an elderly person, and a household with a chronically ill person)?

What services are available in your community? Can you list them and draw them?

What health risks are around the village? What makes households vulnerable? Has it always been this way? How does a vulverable household cope with the situation? How does the household access the services?

Figure 12. Vulnerability Map



If the participants have divided into smaller groups, reassemble them and allow group leaders to share.

Use your notes to report the key points of the discussion to the group. Ask the group to list the most important information noted or lessons that can be learned from the mapping exercise.

We have identified a few problems in our community. (List a few problems.)

The different households show us different ways of surviving and coping. (List the ways of living and ways of coping.)

How do households make money? How do households get food?

How do people take care of their health? Where do people get emotional support?

How many vulnerable households have we identified? What types of concerns or vulnerabilities do households in our community face? (List the number of FHH; list the number of CHH.)

Once the group has used the map to fully discuss the needs and concerns of the community and the ways of surviving and coping, decide if making a list of vulnerable households for the entire community would be useful.

Once the group has agreed upon the types of vulnerable households, identify one or more group members who will be responsible for making a list of every vulnerable household in the community.

Blank notebooks will work best, but single sheets of paper may also be used. Let's draw a table together right now for the member who will collect the list of all vulnerable households in the community.

Look at your vulnerable household table. Are we asking for the right information? How will the community group use this list?

If there is not a plan to use the Action Calendar tool, facilitate a discussion about what can be done about the issues and concerns.

We've talked about all the concerns or vulnerabilities in our community. Now what?

Which concerns can we address? Why or why not?

Which concern do we start with? Why this one? How can we address the concern? What resources are needed?

Where can we get them? Let's decide what activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

SESSION 2. MODULE 2.

COMMUNITY CONCERNS BRAINSTORM

For 2 groups

For 1 group

INSTRUCTIONS

Begin the "Community Concerns Brainstorm" exercise by introducing yourself and the exercise.

Now we are going to use another tool to help us identify community issues. This is called the "Community Concerns Brainstorm" (Slide 34). Our purpose is to gather community concerns important to the programme.

Brainstorming is a group exercise. First, members of the group call out many ideas, concerns. and examples.

No ideas are wrong. All ideas are welcome.

Once we have a list of concerns, the group chooses which concerns are most important or most urgent.

Before the brainstorm begins, the group should reach an agreement about the geographic area and the types of services, resources, and organisations that should be considered.

Before we begin, choose the household or group of households most vulnerable right now. Is there a single household in need right now? Is there a geographic location in the community where households are highly vulnerable? Would the group rather focus on a type of vulnerable household? Can someone describe that for me? [Note on the flip chart.]

If it is a small group (6–10 participants) the group can stay together for the exercise.

If the group is large (more than 10 participants), form smaller groups of participants who have characteristics in common. For example, group the leaders with other leaders, providers with other providers, volunteers with other volunteers, and clients with other clients. Another scheme is women with women, men with men, boys with boys, and girls with girls. It is important to keep the community programme in mind when deciding how to form smaller groups.

If the participants break up into smaller groups, provide someone to play the role of a PM&E facilitator for each small group, or assign a group leader who can record or remember what the group discussed. The small-group leader will need to ask the questions provided below and report the small group's responses to the group as a whole.

Use some of these open-ended questions or prompts to encourage participants to share ideas and examples. Remember that this is an information gathering exercise. Also consider the cultural practices that exist in this particular community. Listen and record. Do not correct, teach, or share your opinions. Empower the group to share, prioritise, and problem-solve together.

Tell us about your programme. How are things going?

What do you need that you do not have? What do families need?

What services are available that people are not accessing?

What works well? What does not work well?

We will list our concerns and reasons, and then resources to meet the concerns. The Priority Column in Table 2 will be used last to tick the top two or three priorities.

Ensure that a reason is listed as each concern is listed. (Do not let the group list all the concerns first and then list reasons for each concern; that would take too much time.)

If the group is divided into smaller groups, they may reassemble afterwards so the small-group leader can report back to the larger group. Allow group leaders to share. Often, many concerns are gathered, and not all are relevant. Ask the group to agree on the most important and urgent relevant issues to deal with first.

Use the "Priority" column in the table to put a checkmark next to the top three concerns. Let the group give reasons for their choices. Ask the group to identify resources to address the concern.

TIP: Consider gender, age groups, and locations when a people-related concern is raised.

We will use the Priority Column in Table 2 to tick our top concerns.

How can we prioritise?

Let's consider which concerns are directly related to the programmes.

Which concerns are most important?

Which concerns are most urgent?

Table 2. Community Concerns Brainstorm Table

Priority	Concern	Reasons	Resources

If a plan is not in place to use the Action Calendar tool, facilitate a discussion about what can be done about the issues and concerns.

We've talked about all the concerns in our community programme. We decided together which were the least important and which were the most important. Now what?

Will we start with the most important concern? Why or why not?

Which concern do we start with? Why this one? How can we address the concern?
What resources are needed? Where can we get them?

Let's decide what activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

SESSION 2. MODULE 3.
ACTION CALENDAR

For 2 groups

For 1 group

INSTRUCTIONS

Before beginning the module, draw an "Action Calendar" on a sheet of flip-chart paper (see example in Table 3 or Slide 35). You will need to tape together two sheets of flip-chart paper to allow enough space for the calendar portion of the table (include at least six monthly columns.)

Begin the Action Calendar exercise using the following talking points:

We are going to complete an exercise called "Action Calendar."

The purpose of this exercise is to plan activities that need to be completed by our community group.

Introduce the concept of planning. Use everyday examples to show the group that we all use planning in our lives.

Planning is simply using knowledge and experience you already have to lay out the steps it takes to succeed or be on time.

Planning is an activity that we all do. We plan our meals. We plan the chores we will do in one day or in one week.

Ask the group to start planning activities that will be needed for their programme. Let the group decide what programme activities to include.

Tip: Try to include 2–5 items in the "What activities are expected?" column of the Action Calendar.

Some actions or activities may come directly from the earlier PM&E exercises. Others may be routine or considered important or urgent without the need for any of the PM&E exercises.

Let's decide what activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed. This is how we start to build our Action Calendar.

What activities are expected?

What needs to be done to make the activity happen?

When do we do it? Who does it?

Table 3. Action Calendar

What activities are expected?	What needs to be done?	Person responsible	Week 1	Week 2	Week 3	Comments
Provide school supplies and uniforms to children in need.	Count children in need (with ages and genders).	Member A				
	Raise money.	Member B				
	Get list of needed supplies from school by year.	Member A				
	Arrange to buy supplies and uniforms.	Member B				
	Distribute school supplies and uniforms.	Members A & B				

Once the Action Calendar is made, facilitate a discussion on how it can be used to guide the community group's work and to plan future community group meetings to monitor and discuss progress.

Now look at the Action Calendar. How often should Member A share the group's progress? If the activity should be shared every month, the group should gather to discuss that activity each month. If the activity should be shared once a year, then the group should meet to discuss that activity each year. Let's plan when we should meet, based on our Action Calendar

An Action Calendar can be made for those who are responsible for recording and sharing the information.

Once the group has agreed upon activities for the programme, the group members who are responsible for completing the activities will need calendars.

Blank notebooks will work best, but single sheets of paper may also be used. Let's draw a calendar for each member now.

Now look at your calendars. When is Member X expected to complete an action? When is the action up for discussion? If the activity should be shared in the summer, then the group should meet to discuss that activity in the summer.

SESSION 2. MODULE 4.
COMMUNITY MONITORING TABLE

For 2 groups

For 1 group

INSTRUCTIONS

Before beginning the module, draw a "Community Monitoring Table" (see example in Table 4 or Slide 36). You will need two sheets of flip-chart paper (taped together) to allow enough space for the calendar portion of the table (include at least six columns.)

Begin the Community Monitoring Table exercise, using the following talking points:

Now we are going to learn about another community group tool, called a Community Monitoring Table. This will help you monitor the supplies and services provided by the programmes in our community.

We will learn how this works by creating and completing a Community Monitoring Table during this exercise.

Introduce the concept of monitoring. Use everyday examples to show the group that we all use monitoring in our lives, even though we do not refer to it as such.

Monitoring is simply gathering information to look for changes over time.

Monitoring is an activity that we all do to keep track of something; we just don't call it "monitoring." We monitor our kids. We monitor our food. We monitor our crops. We monitor the amount of money we have to spend. We may even monitor our husbands or wives.

Introduce **monitoring activities**. Explain that monitoring activities should be done more than once and recorded each time.

Monitoring is about tracking changes. When we monitor, we watch what is happening to see if things have changed. Therefore, in order to be sure of change, we should carry out our monitoring activities more than once and always keep records of how things were in the past. Because of this, monitoring activities must also include taking notes.

When you take your child to the clinic, the nurse may record the child's weight. If the nurse didn't weigh your child at each visit, it would be difficult to know if she was healthy and growing.

A monitoring activity can be an observation, a count, or a measure recorded over time. For example, a mother observes that her child has a cough for three days, or a teacher counts the number of children who attend class each day, or the nurse measures the weight of your child at each visit.

A good monitoring activity records something very specific and something you can measure easily, such as the number of days a child has a cough, the number of children in attendance at school, and the weight of a child over the first year of life.

Inform the participants that group discussion is also a very important part of any monitoring activity.

Discussion is very important. Let's use the example of you taking your child to the clinic.

The nurse may measure and record the child's weight. If the nurse didn't do this at each visit, it would be difficult to know if your child was growing. The nurse then discusses your child's growth pattern with the doctor, in order to make a plan to help improve or maintain your child's growth. The nurse and the doctor then talk to you, so that you understand how your child is progressing and what you need to do to keep him healthy.

The same goes for our work. Once the observations or counts have been recorded, the information should be discussed among the group. Then everyone will know the information, and everyone has a chance to share what they think the information means to the community programme.

Facilitate a discussion about what needs to be monitored. Community concerns may come from the Community Concerns Brainstorm exercise, or the group may be able to agree on important or urgent concerns without the help of the Brainstorm exercise.

Think of your community programme like a teacher's classroom. To monitor your programme well, you collect information at the beginning, middle, and end, so that you can track whether you are making progress in your community.

Let's decide what monitoring activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

There is no right answer on which monitoring activities to choose. We will use our own judgment and relate it as closely as possible to what activities are expected and what needs to be done.

If we choose monitoring activities that count people, we will try to separate people by gender and then by age, location, type of household, or some other important variable when we record that information. This is important because people are not the same, and depending on their gender, age, and other characteristics, their situations may change.

Make a list of what needs to be monitored. Use the following questions to get started:

What do we need to monitor? What is the monitoring activity?

Do we need to consider gender, age, location, type of household, or anything else?

When (how often) do we monitor? How often does the activity take place? Who does the monitoring?

When (how often) should results be shared?

Community Monitoring Tables can be completed during community meetings for recording and sharing the information gathered by the monitoring activities.

Now that the group has agreed upon monitoring activities for the programme, we can make a Community Monitoring Table to record them. The information we record on the table is called an indicator or a detail of our story.

A blank notebook will work best, but single sheets of paper may also be used. Let's draw a table now.

If the monitoring activity should be shared every month, the group should gather to discuss that monitoring activity each month. If the monitoring activity should be shared once a year, then the group should meet to discuss that activity at the correct time each year.

Table 4. Community Monitoring Table

Indicator monitoring activity	Person responsible	When to report	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total	Target	Notes
Number of MVC who are not going to school	Volunteer	Mar Jun Sep			15			10			5	N/A	0	
Number of MVC who received at least one care service	Volunteer	Mar Jun Sep			20			21			25	N/A	23	
Number of MVC caregivers who are interviewed during home visit for care plan	Volunteer	Mar Jun Sep			3			0			2	5	23	Not enough time to revise existing care plans, but added five new MVC households
Number of income-generating groups formed by HBC households	Volunteer	Mar Jun Sep			2			2			1	5	5	Reached "total target"
Number of households with small-scale businesses, gardens, livestock	Volunteer	Mar Jun Sep			20			25			40	85	75	Exceeded "total target"
Number of HBC households fed regular meals	Volunteer	Mar Jun Sep			10			20			35	65	75	Keep up the good work!

Once the Community Monitoring Table is made, note whether more than one member completes the same monitoring activity. If yes, each member will report their own counts and the group will tally those counts and discuss them. Make observations about the monitoring activities based on who, what, and when. Note if it will take more than one step to complete a monitoring activity.

If targets are not available, consider where to find them. Examples of targets are the number of children in the community and the number of vulnerable households in the community.

Members may want their tables for their own use. Help those members make a table unique to them.

Members may have standardised report forms from their MVC or HBC programme. Encourage members to bring those forms to the meetings.

Now, look at each monitoring activity. Do any of these activities involve more than one step?

How will we help volunteers remember to do these monitoring activities? How often does their activity take place?

Does anyone already use a form?

Does anyone want help making a table to track their monitoring activities?

If a plan is not in place to use the Action Calendar tool, facilitate a discussion about what can be done about the issues and concerns.

We've talked about all the things we need to monitor in our community programme. Now what?

When we get together to discuss our monitoring activities, what will we do? If there are concerns, how can we address them?

What resources are needed? Where can we get them?

Let's decide what programme activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

SESSION 2. MODULE 5.
COMMUNITY SCORECARD

For 2 groups

For 1 group

INSTRUCTIONS

Decide if dividing the participants into smaller groups is necessary. Participants will be divided into groups that are alike: volunteers with volunteers, caregivers with caregivers, clients with clients, and so on. A PM&E facilitator should be assigned to each small group. To use the scoring method presented in this session, groups must be of equal number. Draw enough Community Scorecards on flip-chart paper (see Table 5 or Slide 38 for an example) for each group to have one.

Introduce the Community Scorecard exercise to all participants using the following talking points:

We are going to complete an exercise using another tool called the "Community Scorecard" (Slide 37).

The purpose of this exercise is to help us understand how well MVC/HBC services change lives in our community.

Has anyone used this scorecard before? Tell us about that.

Explain that the purpose of the Community Scorecard is to review the processes in place that provide services and identify areas of improvement. It is not about the people who provide the services!

The Community Scorecard is meant to improve service delivery and communication in the community. IT IS NOT ABOUT PLACING BLAME. IT IS NOT ABOUT POINTING FINGERS. Do not look at people or individuals but rather at programmes and policies.

Tell me about some general issues with certain aspects of your programme and the types of services offered.

What is the role of the community in service delivery?

What types of things can we discuss today using the Community Scorecard?

Introduce quality scores (Slide 37 again).

Quality scoring is about tracking changes. Therefore, quality scores should be decided today with the agreement that we will meet again to provide new progress scores and discuss changes that may have occurred.

A quality score can be an observation, a feeling, or an opinion recorded over time.

For the Community Scorecard to work well, observations, feelings, or opinions should be very specific and likely to change over time.

An example of an observation score is a test grade. The teacher observes the number of mistakes a child makes on a test and provides a score.

"I like mangos" is a feeling or an opinion, but it is not a good opinion score, because it is unlikely that my opinion about mangos will change. "I had enough mangos to eat this week" is a good opinion score, because it allows my feeling or opinion to change over time.

Other good quality scores would be, "MVC households get the assistance they need from the MVC programme" and "income-generating groups provide me with the things I need to start my own business."

Have the group(s) decide the list of services and/or community concerns they will address (Slide 38). These may come directly from the Community Concerns Brainstorm exercise conducted earlier. The small-group leader for each group will write them on the scorecard.

Let's make sure we agree on the types of services and the names of organisations that are involved in the MVC/HBC programme.

Now let's make a final list of community concerns or community services that we want to learn more about.

We will start with the list we have here, and add any new concerns to your Community Scorecard.

Tips: Take notes during the discussion.
Keep reminding participants that the scorecard is **NOT** about blame.

Explain how the service and/or community concerns can be rated using sad and happy expressions to represent the progress scores. Use drawings for additional clarification.

Let's talk about how some services may make us feel.

Sometimes we can tell a lot about how people feel by their faces. A big smile may mean that they are "very good." A little smile may mean they are "good," and no smile means they are "just okay." (See Figure 13 or Slide 39.) Use these scores: very good, good, just okay, bad, or very bad.

Figure 13. Emoticon faces for scores

You may have an opinion or feeling about a service you have received, or a service someone in your household received, or someone in your community has received. Expressing your opinion or feeling by choosing one of these scores will help track community concerns over time.

If you answer that the service is good today and very good next month, then we can say the service is improving.

If you answer the service is good today and bad next month and very bad the month after that, then we can say the service is declining.

Once the participants understand the "smiley-face" scoring system, it is time to start scoring services and/or community concerns. It is important to divide the participants into smaller groups that are alike: volunteers with volunteers, caregivers with caregivers, clients with clients, and so on. Don't forget to make them of equal number! Someone in the role of a PM&E facilitator should be assigned to each group.

Facilitators will help the groups choose observations or opinions they feel qualified to score. For example, a group of clients may not feel qualified to score the observation, "School supplies are available on time for every child in need." Or a group of providers may not feel qualified to score the opinion, "Clients always feel comfortable asking questions about the service."

Tip: Including 2–5 observations/opinion scores is a good goal.

The PM&E facilitators will help the groups reach consensus on a score. If consensus is not reached easily, a vote should be taken. (See the tips box for instructions.)

Tip: Follow these instructions to conduct a group vote on a score.

Ask participants to raise their hands in response to each issue. For each response, multiply the number of hands by the number assigned to the emoticon face. Write that number in the appropriate box. Once you have taken votes for all five possible responses to the observation or opinion, add the row of numbers together and divide by the total number of people who voted. The average is the quality score for that observation or opinion.

To begin the scoring, we will divide into groups of providers and clients. Clients will share their thoughts and feelings with other clients. Providers will share their thoughts and feelings with other providers.

The facilitators will lead each group to choose a score for each observation or opinion listed on the card. The scorecard may look a little different for providers and clients.

We will help the groups decide if there is an observation or opinion they feel they cannot score, and it will be left off the scorecard for that group.

We will need to record the progress scores for each issue. We will vote if it is necessary.

It is also important for each group to note the reasons for their score. Record the group's thoughts, feelings, and opinions. Explain why the service is or is not changing lives in the community.

Start with the first issue and ask the group to give it a score (see Table 5 or Slide 38). People in the group may not feel the same about the issue, so it is important to check that the score reflects the feelings and opinions of everyone. Once the score has been agreed on, ask for the reason(s) for the score. Note the reason(s) in the matrix. Use an example first to be sure that everyone understands how this should be done.

Table 5. Community Scorecard

Community Scorecard Date:			**Programme Area:**			**Facilitator Name:**	
	Quality Score						
Observation/ Opinion	**Very Bad** **1**	**Bad** **2**	**Just Okay** **3**	**Good** **4**	**Very Good** **5**	**Reasons**	**Action**
School supplies are available on time for every child in need.						Every child gets something, but the supplies do not arrive on time and are not enough for the whole year.	Arrange for more supplies to arrive earlier in the year.
Clients always feel comfortable asking questions about the service.						The HBC worker is just like us. She understands our concerns. She is always eager to listen.	Recognise HBC worker for her good work in the community.

Repeat this process for the other observations and opinions. Discuss.

Great. Now, let's do this for the other concerns.

Ask the small groups to share their Community Scorecards with the larger group. Once each group has had a chance to share their quality scores, reasons, and suggested actions, you may average the quality scores and make one Community Scorecard that represents the entire community group. (See the tips box for instructions.)

Tip: Follow these instructions to average multiple progress scores to represent the entire community group on a summary scorecard.

For each observation or opinion, record the quality score of each group on a summary scorecard. If more than one group chose the same progress score, multiply the number of groups by the number assigned to the relevant emoticon face. Write that number in the appropriate box. Once you have recorded quality scores from all groups, add the row of numbers together and divide by the total number of cards. The average is the quality score for that observation or opinion for the entire community group. This method only works if there is the same number of people in each small group.

Wrap up the exercise by discussing what can be done about the issues and concerns.

Now that you have completed the scorecard, share it with others in the community group. Share the issue(s), the score(s), the reasons for the score(s), and the suggested action(s).

How do you feel about the scores? What can we do to improve low scores? What can we do to maintain high scores?

Let's decide what activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

If a plan to use the Action Calendar tool is not in place, facilitate a discussion about what can be done about the issues and concerns.

We've talked about all the things we need to monitor in our community programme. Now what?

When we get together to discuss our monitoring activities, what will do?
If there are concerns, how can we address the concern?

What resources are needed? Where can we get them?

Let's decide what programme activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

SESSION 2. MODULE 6.
SINGLE CASE REVIEW

For 2 groups

For 1 group

INSTRUCTIONS

This exercise has three parts. The first part is to review one case in-depth. The second part is to briefly review a second case compared to the first, discussing similarities and contrasts. The third part is to engage in a discussion where the group generalizes the lessons learned from both cases to all beneficiaries in the community who face similar concerns.

Now we are going to use another useful tool called the "Single Case Review" (Slide 40).

The purpose of this tool is to help us understand how well MVC/HBC services change lives in our community.

The Single Case Review is a learning opportunity. We will look at one particular case in great detail.

The case does not have to be difficult. One person tells the rest of the group about a situation where she or he helped a child, an individual, or a household to receive needed services.

The rest of the group then participates by asking questions, sharing experiences, and learning from each other.

Ask for a volunteer to describe an interesting case from her own experience. Depending on the confidence or experience level of the group, you may wish to use your own example. (See the appendixes for example cases you may use to role-play for Single Case Review.)

Has anyone here been working in the community?

Can you tell us about a particular case where you helped one vulnerable individual or household to get needed services?

Tips: It is important to take notes during the discussion.

If the members of the group do not directly work in the community, you will need to provide an example case to review and discuss in this module.

Use some of the following questions to guide the storytelling.

Did you identify a vulnerable child, adult, or household?

What were the concerns of the client?

What concersn did you identify with your observations of the situation?

What activities did you do to address the concerns?

How did you know if things had changed?

How did you decide which concern to address first?

Were you able to address all the issues? Explain.

Was there anything you are proud of?

What would you have done differently?

Did anything about this client's situation confuse you? Explain.

Were you ever concerned for the client's safety?

What other materials or support might have helped you with this case?

Use some of the following questions to guide the group discussion about the case that was presented to the group.

Has anyone worked on a case that was similar to this one? How was it similar? How was it different?

Were there any other concerns? How did you deal with them?

Did you need or get any additional support to help manage the case? Tell us about it. Was it helpful?

Is there anything you would do differently if you were to encounter a similar case again? What would that be? Why?

Facilitate a group discussion about concerns that may be common or apply to other community members.

We know that vulnerable people may need help getting healthcare, education, and food. But they may also need other types of support.

How do you think vulnerable people in your community feel? Are they embarrassed? Do they feel ignored, unimportant, or unheard?

How do they feel about receiving goods and services? Are they more confident? Are they ashamed?

Tell me about some of the attitudes in your community.

Use your notes to reflect on key points and important lessons learned.

We have identified some important points to remember when working in the community. (List a few key points on the flip chart.)

Every individual is vulnerable in different ways. (List some types of support that vulnerable persons need and some ways of helping them.)

If a plan is not in place to use the Action Calendar tool, facilitate a discussion about what can be done about the issues and concerns.

We've talked about all the concerns and vulnerabilities in our community programme. Now what?

Which concern or vulnerability do we start with? Why this one?

How can we address the concern? What resources are needed? Where can we get them?

Let's decide what activities are needed, how often they should be done, who needs to do them, and how often they need to be discussed.

Closing Points

Take a moment to reflect on what you've learned about PM&E methods so far.

- First, we used the Vulnerability Map to identify members of the community who are most vulnerable and in greatest need of support.
- Then we used the Community Concerns Brainstorm to discuss problems and prioritise issues. This was our first step towards making a plan to help our communities
- To support our community's needs well, we used the Community Monitoring Table and the Action Calendar to develop activities that would allow us to **monitor** our efforts and **evaluate** whether we are succeeding.
- We also learned how to use indicators on a Community Scorecard to rate the progress of our activities.
- We learned how to use case studies to improve our service delivery.
- We learned that when everyone participates in M&E activities, we discover more about what is needed and how our services can be most effective. We discussed our results together to increase our understanding, improve our plans, and guide our work in the community.
- This is PM&E: participatory monitoring and evaluation.

SESSION 3.
REFLECTION AND ACTION

OVERVIEW

In this session you will guide the group to better understand how to use the information they collect and how to engage with community members to act on their observations. You will explain why tracking programme performance is important and provide ideas for planning and preparing for a programme evaluation. You will provide examples of the type of information that can be used in an evaluation and how this information can be recorded through PM&E activities. You should emphasize the importance of sharing and using PM&E information

LEARNING OBJECTIVES

By the end of the session, participants should be able to do the following:

- Appreciate the value of conducting programme evaluations
- Understand how a programme assessment can be performed, and the preparations that should be mad beforehand to ensure it is done well
- Understand why results of an evaluation should be shared

SESSION OVERVIEW

Module 1. Why Reflect? Use the Programme Path (see Figure 14 or show Slide 26) to illustrate the purpose and importance of programme evaluation. Practice the planning and preparations needed to ensure a good evaluation of programme performance.

Module 2. How to Reflect Using Information from Monitoring Activities: Discuss how the information from monitoring activities (recorded in the Community Monitoring Table) and progress scores (recorded on the Community Scorecard) can be analysed. Share plot graphs for programme information analysis.

Module 3. How to Take Action: Discuss how information from a programme evaluation can be shared to acknowledge the good work of community members and improve how we manage programmes and use resources.

INSTRUCTIONS

If necessary, review the previous module(s) or answer any questions.

Explain the learning objectives for this session.

SESSION 3. MODULE 1

WHY REFLECT?

INSTRUCTIONS

Explain the purpose of a participatory programme evaluation (Slide 42).

Evaluation is about measuring change. Evaluation is also about learning.

After we have completed some or all of our activities, we can learn from the process by reflecting on what worked well and what did not work well.

Figure 14. Detailed Programme Path (from Session 1)

Re-introduce the PM&E Programme Path (see Figure 14 or show Slide 26). Facilitate a large-group discussion on how information gathered using the Community Monitoring Table and the Community Scorecard can be used in a reflection meeting.

Let's look again at Step 4 of the PM&E Programme Path: Take Action, then Monitor and Reflect. Every meeting where we come together to report on our plans and activities is an opportunity to reflect on our work, but we can also plan meetings specifically to reflect.

Participatory evaluation involves making comparisons, reflecting on what we have learned, and making decisions to take new actions.

How can we use the information we collect?

Would we need to make any preparations to be able to use this information? Why or why not?

Facilitate a large-group discussion about the basic components of an evaluation (Slides 43–45).

When we evaluate, we are looking closely at the information we have gathered in order to assess change. In this way, programme evaluations can help you to identify and understand the outcomes of your programme, or the endings to your story.

The **FIVE parts** of an evaluation are:

1. A strong goal statement *(happy endings; fruit)*
2. A programme or set of activities
3. A timeline (in which month does the programme start; in which month does it end?)
4. People to record monitoring activities and quality scores
5. People to make comparisons, reflect, and take action

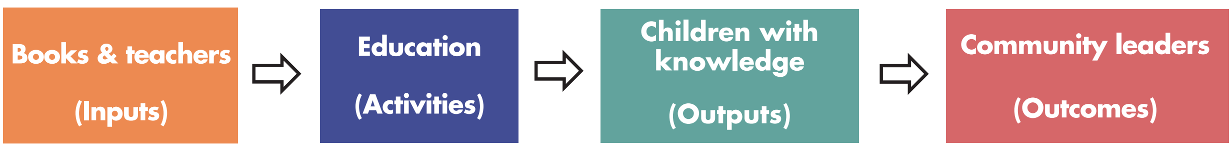
Use the programme goal that was set at the beginning. The programme goal statement includes the period that was planned to reach that goal. Record the month in which the programme started and record the month in which it will end.

Remember that a strong goal statement is specific and measurable: for example, "Increase the number of children who complete secondary school in the community in five years."

Remember the M&E model for most vulnerable children? (See Figure 15 or show Slide 14.) What is the specific period in which we expect to reach our goal? What details are we looking for? What indicators can tell our story?

Facilitate a large-group discussion about what the preparations for a reflection meeting might look like (Slide 46). Explain to the group that there are four steps: (1) record the information; (2) think about comparisons; (3) reorganize and tally the information to reflect those comparisons; and (4) discuss and interpret the meaning of the observations and what should be done about them.

Figure 15. M&E model for most vulnerable children



Good planning and preparation are necessary for a good reflection meeting. Let's talk about some things we might need to prepare to ensure a good meeting in Steps 4 or 5.

If we want to reflect on information that has been recorded over time, we need to do four things:

First, we need to record the information (Slide 47).

Second, we need to think about comparisons. Someone will need to organise or tally the information, so that final comparisons can be made. We can compare information using time, gender, age, location, or type of household. But you must have recorded that information in your Monitoring Table or Community Scorecard.

Third, we need to record the comparisons (Slide 48). Someone should write these observations down.

For example, "more boys than girls attended school in the past five years" is an observation that could be made from the information collected with the Monitoring Table.

Finally, we need to discuss the comparisons. What do these comparisons mean? What do we want to do about this new information?

For example, why are more boys than girls in school? Do we want to increase the number of girls in school? How can we increase the number of girls going to school? How can we continue to support boys going to school?

Tip: When planning a participatory evaluation meeting, consider inviting outsiders, such as community leaders, representatives of international NGOs, or government officials who may have a different way of thinking about the comparisons.

Small-group breakout session: Divide participants into small groups to design a participatory evaluation process. Ask them to use previous goal statements, M&E models, and indicators (details) from Session 1. The groups should identify the PM&E community group tools (from Session 2) that are appropriate for collecting the indicators, and create a timeframe for the evaluation using a strong goal statement. Ask the small groups to present to the larger group.

Let's plan a participatory evaluation.

We will use the strong goal statements, M&E models, and indicators that your small group developed in Session 1.

Break out into your small groups again. You may review and revise the work you have done. Your group should also identify which PM&E tools might be appropriate to collect the indicators/details. The group should identify the evaluation timeframe using the strong goal statement.

When your group presents, please include the tool(s) you will use to collect the indicators, when you will start the use of each tool, how often you will use each tool, when you will stop collecting information with each tool, and when you will reflect and act.

SESSION 3. MODULE 2.

HOW TO REFLECT USING INFORMATION FROM MONITORING ACTIVITIES

INSTRUCTIONS

Discuss with the large group the types of information that will be available from the monitoring activities (Monitoring Table) and quality scores (Community Scorecard) and how it could be used to acknowledge the good work of community members, improve how we manage programmes, or improve how we use programme resources.

Before an evaluation can take place, the PM&E facilitator should organise all the information collected so that patterns can be observed and comparisons made.

In your small group breakout sessions, what information interested the groups?

Where did your group get that information?

Once the PM&E facilitator has organised and tallied all of the information, how can the information be used to tell a story?

How can the information be presented for discussion?

Facilitate a discussion about how the information collected *over a period of time* can be used in the evaluation to assess progress towards achieving goals. Discuss other comparisons that could be made. Don't forget to build these into your monitoring activities or your progress scores with the community group.

There are no right or wrong answers in an analysis; just good questions. You may choose to compare the information by the following:

Time: Does the information change from month to month? From quarter to quarter? Year to year?

Gender: Are the outcomes different between vulnerable girls and vulnerable boys?

Age groups: Have younger people been assisted better than older ones?

Location: Have some locations not been reached with services?

Activities: Were some activities more successful than others?

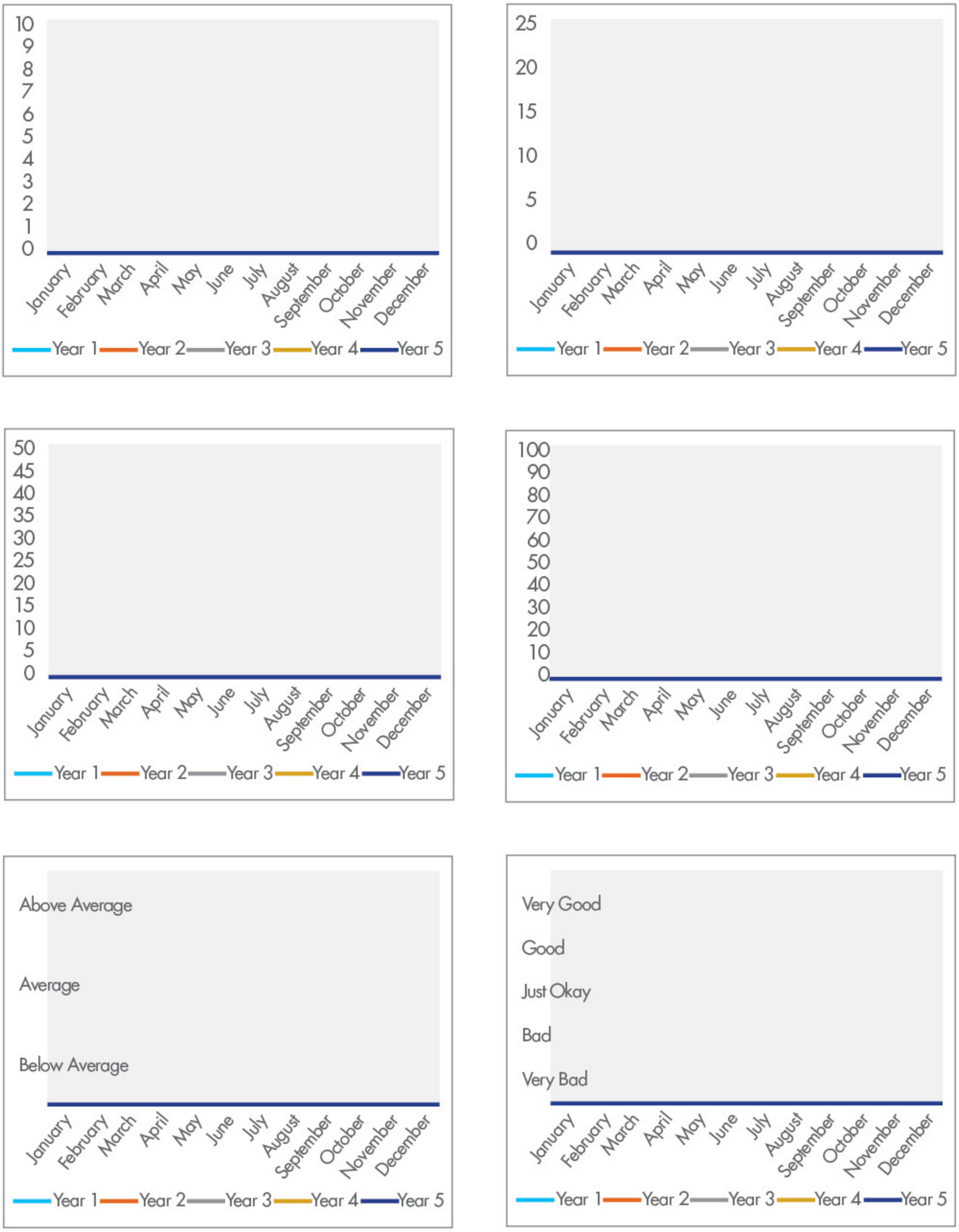
What other comparisons might you find in your programmes? How could you use this information to improve your work and take new action?

Large-group practice: Use plot graphs (see Figure 16 and Slides 49–52) to tell a story using information from the PM&E tools.

Use the following examples in a large-group practice. Ask the group to review the information provided by the PM&E tools from Session 2. Ask the group to match the data from the PM&E tools with the best plot graph.

The examples are just guides. Feel free to plot the data to tell the stories you think are most relevant, or the explanations you feel are most needed. Discuss how comparisons of different groups could be displayed on the graph (boys vs. girls, Village A vs. Village B vs. Village C, Year 1 vs. Year 2). Discuss what can be learned from the graph(s) and whether this information is important. Ask the group to suggest how information from the graph can inform what we do next.

Figure 16. Plot graphs



SESSION 3. MODULE 3.
HOW TO TAKE ACTION

INSTRUCTIONS

Explain how sharing information helps us learn together, using the following talking points (Slide 53):

Remember that PM&E is about learning together from our successes and our mistakes.

What discussion questions can you prepare for the reflection meeting?

What story can be told with PM&E information?

With whom might we want to share the results of our evaluation? Why?

The programme evaluation is not just about reporting to donors and international NGOs. It is an opportunity for us to learn and improve how we manage ourselves, our resources, and our work in the communities.

Uses of programme evaluation

Improve programme based on knowledge of what worked well and what didn't.

Acknowledge the hard work of members and volunteers.

Celebrate successses as a team.

Make a plan for moving forward.

With whom might we want to share the results of our evaluation? Why?

How else can we use our programme evaluation?

Facilitate a large-group discussion about what can be learned from an evaluation, and how this information could be used to inform our plans and activities.

Think about the plans you have made and the work you have done in your communities. How could you use the information from a programme evaluation to improve your work and action?

Were all the planned activities carried out? Why? Why not?

Did these activities achieve the intended results? Did the project achieve more than was planned? What worked well? What did not work well? What could have been done differently?

Did you know about activities that MVCCs and other volunteers were doing in other areas? Could you use these in your area(s)?

Did you make any changes going forward? Why or why not? How did you or your group decide on what should change?

Closing Points

Evaluation involves analysis of the information we have gathered over time.

We analyse our progress through reflection, comparisons, analysis, and decision making. **There are no right or wrong answers in an analysis, only good questions.**

Plot graphs can be used in analysis to help us tell the story of what worked well and what did not work well.

By helping us to see the progress that has been made, plot graphs can also help to **guide the questions we ask and the new action we take**.

SESSION 4.
COMMUNITY PRACTICE

OVERVIEW

This session provides participants with an opportunity to practice tools in the field with community groups in nearby villages. The modules cover how to: plan and conduct community meetings, reinforce good data collection, and practice good facilitation skills.

LEARNING OBJECTIVES

By the end of the session, participants should be able to do the following:

- Use the PM&E tools with community groups
- Assess their confidence in using PM&E tools
- Reflect on which PM&E materials best support their work

SESSION OVERVIEW

Module 1. How to Prepare Your Community Meeting: Participants will use this time to review the PM&E field manual, and prepare their materials for the field practice.

Module 2. How to Facilitate a Meeting: You will provide general tips and guidelines for carrying out effective meetings either with the community in general or the groups working to support the community.

Module 3. How to Conduct a Community Meeting Using PM&E Tools: Field practice.

Module 4. How to Share Field Practice Experiences and Evaluate PM&E Training: Participants present PM&E findings from the field practice to the larger group. The group discusses their successes and challenges in the field. You facilitate a training evaluation.

INSTRUCTIONS

If necessary, review previous module(s) or answer any questions.

Explain the learning objectives for this session.

Be available to help review materials and answer questions as participants prepare for their field experiences.

SESSION 4. MODULE 1

HOW TO PREPARE YOUR COMMUNITY MEETING

INSTRUCTIONS

Show Slide 54.

Divide participants into their field groups.

Assign them a PM&E tool to practice with a community group.

Provide them with the materials they will need.

Ask the group to use an hour of instruction time to review the field manual, prepare their materials, and decide who will be the recorder and the facilitator.

SESSION 4. MODULE 2

HOW TO FACILITATE A COMMUNITY MEETING

INSTRUCTIONS

Introduce qualities of a good facilitator. Capture ideas on a flip chart.

In order to become PM&E facilitators, you have learned a lot about PM&E. Now you will have an opportunity to bring the PM&E process to the community. Let's discuss what makes a good facilitator. Here are some ideas:

Good facilitators value people and their ideas.

Good facilitators don't take sides.

Good facilitators think quickly.

Good facilitators actively listen to every person.

What else makes a good facilitator?

Brainstorm the role and responsibilities of a facilitator, and capture ideas on a flip chart. Ask the group to share ideas. Present the remaining roles and responsibilities that the group did not volunteer.

What is your role as a facilitator? What responsibilities do you have?

Prepare for the meeting in advance. Know your material. Know your audience.

Ensure the meeting is recorded in writing. Recording facts is a critical part of PM&E.

Introduce yourself and describe your role. Explain the purpose of the meeting.

Help the group agree on ground rules.

Tips:

One person speaks at a time.

No side discussions.

Avoid judging others.

Be specific.

Keep discussion focused.

Respect views of others even if they do not conform to your own.

Help keep track of the time.

Guide the group to make their own decisions.

Empower the group to share and problem-solve together.

Do not correct, teach, or share your opinions.

Encourage participation from everyone.

Provide closing statements and restate next steps.

Share tips for good facilitators.

It's hard work to stand in front of a group and lead a discussion that includes all voices. Here are some strategies:

Find common ground: Share something about yourself with the group; ask them about themselves.

Ask open-ended questions and use prompts for discussion. Yes/no questions will not get a conversation started.

Be sure to avoid leading questions. We want to respect member contributions and ensure open trust between the facilitator and the group.

Consider bouncing a question or statement back to the group. Use this strategy instead of passing judgment on an individual contribution, using close-ended questions, or using leading questions.

Tips: Use open-ended questions like these for group engagement:

What would happen if we tried it?

In your experience, what is needed?

Can you tell us more about that?

What do you think about what was said?

What ideas do you have?

[Insert name], you've been quiet. What are your thoughts?

Let the group decide.

Summarise what people say to move the discussion along.

Encourage equal participation among all group members.

Embrace silence. Sometimes people need time to think before they speak up.

Remind the group to stay focused on the goal or purpose.

Do not be afraid to interrupt or redirect politely and respectfully.

Use a "parking lot" sheet to write down issues that need to be deferred for later discussion in order to keep the conversation focused on the main issues.

Explain to participants that it is important to match the type of meeting to the purpose of the meeting.

There are different kinds of meetings.

Community meetings: Sometimes sharing important information with everyone is necessary and calling a large community meeting is a good way to do that. Don't try to gather opinions or start a discussion in a large community meeting.

Group meetings: Smaller meetings (8–10 people) are great for gathering new ideas and opinions. With a good meeting facilitator, people can also make plans and agree on how to work together as a team to accomplish a goal.

Small meetings: Meetings with two people or just a few people are also important. These can be effective if you need to meet with a community leader to get permission for a new activity or with a few community group members to plan a larger meeting or solve an immediate problem.

SESSION 4. MODULE 3

HOW TO CONDUCT A COMMUNITY MEETING USING PM&E TOOLS

INSTRUCTIONS

Divide participants into their field groups. Each group should have a trainer or senior programme manager to accompany them. Answer any questions they have. Then allow 1.5–2 hours for the training participants to conduct their meetings as actual field practice.

You should be available to answer questions, encourage training participants, and take notes on participants' improvement. You should not co-conduct the community meeting.

SESSION 4. MODULE 4

HOW TO SHARE FIELD PRACTICE EXPERIENCES AND EVALUATE THE PM&E TRAINING

INSTRUCTIONS

After the field practice, bring the larger group back together. Ask each group to present their findings using the tool they were assigned. Each presenter should summarise what worked well and what did not work well. Allow the larger group to ask questions of the presenters.

Use the Community Scorecard to gather information about the group members' confidence in using the tools (see Table 6). Ask the group to provide a score for the relevant questions, such as, "How confident are you in using the Vulnerability Map?" and "How confident are you in using the Community Concerns Brainstorm?"

Table 6. PM&E Training Scorecard

PM&E Training Scorecard Date:				**Training group:**		**Facilitator Name:**	
	Quality Score						
Observation/ Opinion	**Very Bad**	**Bad**	**Just Okay**	**Good**	**Very Good**	**Reasons**	**Action**
Vulnerability Map							
Community Concerns Brainstorm							
Action Calendar							
Community Monitoring Table							
Community Scorecard							
Single Case Review							
Plotting Tables for Analysis							

Other questions for a training evaluation discussion are:

- What is your understanding of PM&E?
- How has your understanding of PM&E changed after the training?
- What was not included in the training that would improve your understanding of how to lead PM&E activities in community groups?
- What will you use in your work that you learned in the training?

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APPENDIX A.
WHAT IS PARTICIPATORY MONITORING & EVALUATION?

Participation

- Participation is a wonderful-sounding word that is likely to be misunderstood.
- In the present context, it means “to take part in a joint activity,” through which the different experiences, “ capabilities, and knowledge of the participants can be used.
- In self-promotion, it means there should be a continuous empowerment of people’s groups going hand-in-hand with a continuous relinquishment of power by the development organisations and funding agencies.
- Participation implies an empowerment of the members of the self-help group, and even of the development organisations or NGOs vis-à-vis the funding agencies.
- Participation is an ongoing process where one side discovers capacities of its own and learns to act more and more autonomously, and the other side learns to accept other viewpoints and to hand over responsibilities and power.
- Participatory monitoring should help those involved to learn to draw conclusions for decision making out of the practice-error-reflection-correction-and-action process, and guide the activities according to “lessons learned.”

Monitoring

- Monitoring is a process of systematic and critical review with the aim of checking an operation and adapting it to circumstances.
- Monitoring yields valuable insights from the projects.
- Typical elements of monitoring are:
    - Ongoing review (to observe changes in project implementation)
    - Systematic documentation (to document this process of change)
    - Analysis and decision making (to reflect, to adjust, and to rectify the operation)

Evaluation

Evaluation involves comprehensive analysis of the operation with the aim of adapting strategy and planning to circumstances. Evaluation is a less-frequent form of reflection; it is deeper and leads to more fundamental decisions.

Linkage of Monitoring and Evaluation

As monitoring and evaluation are two sides of the same coin (often referred to as “M&E”), differing only in frequency and range of decisions, monitoring often goes hand-in-hand with evaluation.

Participatory Monitoring

What Should Be Monitored?

The group should systematically monitor the changes that are important to its members. The findings will depend on who is doing the observing, because everybody sees different things and attaches different levels of importance to what each sees.

Steps To Be Followed

1) What should be watched?

2) How is it done?

3) Who should watch?

4) How can results be documented?

5) What was observed?

6) Why these results?

7) What action should be taken?

Participatory Evaluation

- Participatory evaluation is a process of involving participants in programmes to reflect critically on their own projects, programmes, aims, and leadership.
- Its value is that it continues the process of action-reflection, and increases the awareness that people themselves can shape their own lives and destiny.
- The people themselves examine the strengths and the weaknesses so that they can contribute more to the success of their own work.
- The main purpose of participatory evaluation is to have a positive effect on the participants' own lives and the community of which they are a part.

When Do We Evaluate?

Community-based organisations or groups need to be encouraged to have regular evaluations to avoid the problem of evaluating too late (when a crisis has become too big) or too early (when there is not much to evaluate).

APPENDIX B. CASE STUDIES FOR SESSION 1
INTRODUCTION TO PM&E

"Case Study 1: Supporting a Second Chance and Better Future for Rehema" highlights the story of vulnerable child.

CASE STUDY 1
SUPPORTING A SECOND CHANCE AND BETTER FUTURE FOR REHEMA

Orphaned at the age of five, Rehema drops out of school to work around the house and in the field. Now, at 11 years of age, Rehema cannot read or write, lacks confidence and is embarrassed about not having education.

Rehema is identified as a most vulnerable child, through the work of community groups. The community groups help with uniforms, socks, and books to support Rehema's enrollment in school. In addition to education and learning, the school teaches sewing and encourages participation in sports such as netball.

Rehema learns to read and write at school. She also learns to sew and takes part in netball after school. These activities help her to develop self-confidence, so that she can speak out and express herself in front of people.

Rehema becomes a leader in her school. She applies her new confidence to netball and becomes a national champion. She also becomes a role model in her village. She uses the sewing skills she learned to earn extra income. She also helps other vulnerable children in her village and teaches them to read and write.

"Case Study 2: A Father's Success Using 18,000 Shillings and Duck Keeping" follows the head of a household as he receives services from community groups to help with the care and support of his family.

CASE STUDY 2

A FATHER'S SUCCESS USING 18,000 SHILLINGS AND DUCK KEEPING

Living with HIV in a rural district in Tanzania, Hussein needs some kind of income to support the basic needs of his four children.

Hussein's children are identified as MVC through the work of community groups. The members of these groups then help to support Hussein in the amount of 18,000 shillings to start an income-generating activity in January. Hussein decides to establish a duck-keeping activity. He buys five ducks for 3,000 shillings each, using a total of 15,000 shillings. He builds a mud cage for the ducks and manages his project well, so that by July he has a total of 70 ducks and a supply of eggs for use in his home. He sells 35 of his ducks, at 4,000 shillings each, earning a total of 140,000 shillings.

Hussein uses some of the money to buy school materials for his children, such as uniforms, exercise books, and shoes. He uses the rest of the money to meet basic needs for his home and children. He uses the eggs in meals for his family to improve their overall health and nutrition. Moreover, Hussein gives at least one duck per hatching to the community groups, so that they can distribute them to other families in great need and help to ensure their health and well-being.

Hussein and his family are healthy. His children enjoy nutritious meals and are able to attend school. In addition, the health and well-being of other vulnerable children in the village are supported through Hussein's donations and continued support.

"Case Study 3: Increasing Psychosocial Support through Kids' Clubs" tells of a community intervention where teachers create and encourage kids' involvement in clubs.

CASE STUDY 3
INCREASING PSYCHOSOCIAL SUPPORT THROUGH KIDS' CLUBS

To increase the care, support, and understanding of children in the community, teachers were trained to provide psychosocial support and then encouraged to start kids' clubs in their schools. The training aimed to improve teachers' interactions with children and teachers' ability to identify children in need of support.

After the training, teachers believe that they can help vulnerable children. Teachers report that they no longer ignore children or act unfriendly towards them. Kids' clubs are created and children in the community are invited to attend after school. Teachers work to find ways to understand the problems children face and ensure that they are cared for through participation in clubs or the support of their peers.

Through participation in clubs, children are introduced to new subjects and activities that are both interesting and challenging. They learn skills that raise their self-esteem and help to develop their talents. Their psychosocial needs are also discovered and supported. Through the clubs, children are able to share their interests with other kids, make new friends, and increase their self-confidence. Through drama, children understand more about HIV- and AIDS-related illnesses and learn that they cannot know whether people are living with HIV just by looking at them.

The children's needs are met holistically. Children start to enjoy the clubs as they get opportunities to show their talents and share life experiences. The clubs make children happy and help them to feel less lonely. Children now know how to support one another through sharing and games. The lessons learned in the clubs help prevent children from getting into trouble or joining groups engaged in bad activities.

"Case Study 4: Strength and Power within Communities" highlights the story of an HIV-positive person helping other HIV-positive people.

CASE STUDY 4
STRENGTH AND POWER WITHIN COMMUNITIES

Born to HIV-positive parents, James has been HIV-positive since birth. Having lost both parents at a very young age, James was raised by a poor and loving grandmother. At 26 years of age, James understands how poverty can make a household vulnerable. He wants to find ways to support other poor families affected by HIV.

James volunteers with a community group that works to improve the health and well-being of people affected with HIV. The group receives support from village and ward leaders, who give them information and involve them in meetings. The group is also connected with government health staff to improve access to healthcare services. This support helps the group to better assist individual families. It also helps the group mobilise communities to meet their needs.

With the help of community leaders, James and other volunteers are able to establish a canteen. They also keep chickens using a cross-breeding method. The money generated from the canteen and chicken-keeping is used to support community-building activities, such as vulnerable children's enrolment in school, provision of food and school materials, and repair of homes that have been destroyed. The canteen and chicken-keeping also support improved access to healthcare, HIV testing, and condoms.

Basic needs of children and families affected by HIV are increasingly supported. Involvement of the community helps to improve attitudes towards the disease and create a sense of togetherness. Participation in community activities helps to raise self-esteem among the poor and vulnerable. Communities become more aware of the importance of children's education and encourage school enrolment and attendance.

"Case Study 5: Improving Home-Based Care" tells the story of older volunteers affected by HIV/AIDS who seek to help their community by providing quality home-based care (HBC) and counselling.

CASE STUDY 5
IMPROVING HOME-BASED CARE

Aisha is 65 years old and lives with her husband and niece. She has lost her younger sister, brother-in-law, and nephews to HIV-related illnesses. Wishing to help other families affected by HIV, Aisha becomes trained as a volunteer home-based care provider.

During training, Aisha comes to understand more about HIV-related illnesses. She learns how to advise people about taking their antiretroviral drugs and maintaining a good diet. She learns about the importance of making people feel comfortable, respecting them, and keeping their information confidential. She also learns how to safely care and wash patients by wearing gloves.

Aisha educates her community about HIV prevention and raises awareness about the disease. She advises people to get tested for HIV and promotes safer sex practices, such as the use of condoms. She accompanies sick women and families to the clinic for HIV testing, and visits them at home to provide continued support, advice, and counselling. She also gets condoms from the health clinic for people within the community who are too shy to get them on their own.

Aisha becomes more respected and trusted in her community. She helps to change local community attitudes about HIV and reduce the stigma that is associated with the disease. Neighbours can now be seen visiting and talking to a household that has an HIV-positive member. People in the community realise that talking about the illness and openness about HIV are very important. They begin to view the illness as a community problem rather than an individual's problem. Community members become more willing to help each other. They create support groups that encourage sharing of knowledge, information, and experiences and giving emotional and psychological support.

APPENDIX C.
DEFINITION OF MOST VULNERABLE CHILDREN IN TANZANIA

In the national plan, "most vulnerable children" (MVC) is defined as children under the age of 18 years who are experiencing extreme conditions that lead to great need. The type of needs may be education, healthcare, food, nutrition, shelter, HIV services, early childhood development services, and emotional and physical protection. The national plan uses the following criteria for MVC:

1. Children living in extremely poor households
2. Children whose sole caregiver has a disability
3. Children living in a household with only an elderly caregiver (60 years of age and older)
4. Children who are orphans
5. Children living in a household with a chronically sick caregiver
6. Children with a disability
7. Children with a chronic illness (including HIV)
8. Children living in child-headed households
9. Children living or working on the streets
10. Children assessed to be at risk of or suffering from violence, abuse, and/or neglect
11. Children assessed to be at risk of being, or who are found to be, in conflict or in contact with the law
    a. Children living in institutional care
    b. Children born in prisons or accompanying their mothers in prisons or remand prisons
12. Children involved in the worst forms of child labour (for example, sexual exploitation; illicit activities), in paid domestic work, and in work that consistently interferes with school attendance
13. Children who are victims of trafficking
14. Children assessed to be at immediate risk of substance abuse
15. Children displaced owing to man-made and natural disasters

APPENDIX D.
SUMMARY OF PM&E STEPS

PM&E Steps (& Purpose)	Preparations Needed	Activities to Support
1. Get ready. General community: Inform people living in the community and make them aware of how you would like to use PM&E to help meet their needs. Community group(s): Introduce the need for PM&E, and orient members and volunteers of community groups (such as MVCCs, WORTH groups) to PM&E methods and tools.	Identify stakeholders (such as village leaders) to involve in activities and awareness-raising. Decide if you will meet with different stakeholder groups separately or together, and arrange meeting date(s)/location(s) accordingly. Note resources, audience, travel, time, and other factors. Prepare talking points and/or presentation(s), as suitable for each audience. Identify members, volunteers, and a cofacilitator. Decide on/confirm meeting. Note resources, audience, travel, time, and other factors. Re-orient with/prepare training materials and/or presentations for use in meeting.	**Household visits.** Go house-to-house to inform those who do not come to community meetings. **Community posters/flyers.** Create a one-page flyer for distribution, using as many examples and drawings as possible. **Community gathering.** Introduce PM&E and activities that will take place in a general community meeting and/or with specific community representatives. **Presentations.** Engage stakeholders who are not at the community gathering. PM&E training Agree on date and location for next meeting. *(5–6 weeks)*
2. Identify priorities. Think about and discuss together the issues in the community, and identify priority concerns.	Decide on and confirm meeting.	**Tools** • Community Concerns Brainstorm • Community Scorecard • Vulnerability Map Agree on date and location for next meeting. *(Two 3-hour workshops)*

3. Make a plan. Decide as a group what activities will be done, who will do them, when they will happen, and how they will be tracked and observed.	Review.	**Tools** • Community Monitoring Table • Action Calendar Agree on date and location for next meeting as well as which activities should have been completed by the time of the next meeting. **One 3-hour workshop.** This may take much more time, with multiple sessions and meetings, if the community members are passive or there is excessive conflict.
4. Take action, then monitor and reflect. Do the activities that were described in the plan to help communities achieve their goals. Collect information about the activities. Think, learn, discuss, and adjust plans following the sharing and reflection on experiences and views.	Review.	**Tools (in the Community)** • Community Monitoring Table • Community Scorecard **Tools (in the Meeting)** 1. Discuss Community Monitoring Table, Community Scorecard, and Single Case Review 2. Update Community Monitoring Table and Programme Action Calendar 3. Schedule and agree on date and location for next meeting Set aside 3 days/month for activities, monitoring, and reflection.
5. Take new action, then monitor and reflect again. • Come together and use lessons learned to inform and make decisions on whether to continue the activities as planned, or adjust them based on the new knowledge gained from monitoring and reflection. Repeat as needed.	Review.	**Tools (to adapt)** • Community Monitoring Plan • Action Calendar Typically lasts anywhere from two years to indefinitely.

APPENDIX E.
CASE STUDY FOR SESSION 2 ON PM&E COMMUNITY GROUP TOOLS

YOHAN'S CASE

Yohan is a nine-year-old boy. He lives with his older sister and two younger siblings. His father left the family three years ago and his mother died last year. I am the empowerment worker in his village. We have income-generating groups in our village and MVC programmes.

Yohan wishes he could go to school, but he knows his older sister needs him to work to help the family. Yohan and his siblings work in the fields. Yohan is concerned about his sister, because she has relationships with several older men. She hopes they will help the family with the things that they need.

I am happy to say that I have decided to work with Yohan's sister to help her get a job. This will help the family with the things they need, help the sister rely less on her relationships with men, and eventually help Yohan stop working in the fields and go to school.

I am proud that I realised that the best way to help Yohan go back to school and stop worrying about his sister is to help his sister get a job.

I am frustrated that this plan will take a long time to help Yohan go back to school. Are there other things I could do to help Yohan and his family?

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