

Monitoring HIV/AIDS Programs: Participant Guide

A USAID Resource for Prevention, Care and Treatment

Core Module 3: Developing a Monitoring and Evaluation Work Plan

September 2004

Family Health International



In July 2011, FHI became FHI 360.



FHI 360 is a nonprofit human development organization dedicated to improving lives in lasting ways by advancing integrated, locally driven solutions. Our staff includes experts in health, education, nutrition, environment, economic development, civil society, gender, youth, research and technology – creating a unique mix of capabilities to address today's interrelated development challenges. FHI 360 serves more than 60 countries, all 50 U.S. states and all U.S. territories.

Visit us at www.fhi360.org.

© 2004 Family Health International (FHI). All rights reserved. This book may be freely reviewed, quoted, reproduced or translated, in full or in part, provided the source is acknowledged. This publication was funded by USAID's Implementing AIDS Prevention and Care (IMPACT) Project, which is managed by FHI under Cooperative Agreement HRN-A-00-97-00017-00.

Table of Contents

Learning Objectives	1
Overview of Monitoring and Evaluation Work Plans	2
Disseminating and Using Monitoring and Evaluation Results	3

Developing a Monitoring and Evaluation Work Plan

Learning Objectives

At the end of this session, participants will be able to:

- Understand the rationale, key elements, and steps required to develop a Monitoring and Evaluation Work Plan
- Apply program goals and objectives in developing a Monitoring and Evaluation Work Plan
- Develop program monitoring and evaluation questions and indicators and review the issues related to program evaluation, including selection of data collection methodologies
- Review Monitoring and Evaluation Work Plan implementation issues: Who will carry out the work? How will existing data and past evaluation studies be used?
- Identify internal and external evaluation resources and capacity required for implementation of a Monitoring and Evaluation Work Plan
- Develop and review a Monitoring and Evaluation Work Plan matrix and timeline
- Understand monitoring and evaluation data flow
- Develop and/or review and implement a monitoring and evaluation work plan of a country/site program, taking into consideration donor, FHI and country/site (government) requirements
- Apply the M&E Work Plan Template in developing an individual country/site/program activity work plan (semi-annual plans, annual plans)

Overview of Monitoring and Evaluation Work Plans

Overview of Monitoring and Evaluation Work Plans

The Monitoring and Evaluation Work Plan is a flexible guide to the steps you can use to document project activities, answer evaluation questions, and show progress toward project goals and objectives. As a guide, the M&E Work Plan explains the goals and objectives of the overall plan as well as the evaluation questions, methodologies, implementation plan, matrix of expected results, proposed timeline, and M&E instruments for gathering data.

To ensure that M&E activities produce useful results, it is essential that you incorporate M&E in the program design stage. Planning an intervention and designing an M&E strategy are inseparable activities. To ensure the relevance and sustainability of M&E activities, project designers must collaborate with stakeholders and donors to develop an integrated and comprehensive M&E plan.

Projects at all levels, whether single interventions or multiple integrated projects, should have an M&E plan in place to assess the project's progress toward achieving its goals and objectives and to inform key stakeholders and program designers about M&E results. Such plans will guide the design of monitoring and evaluation, highlight what information remains to be collected and how best to collect it, and suggest how to use the results to achieve greater effectiveness and efficiency.

Comprehensive M&E plans should describe the overall goals and objectives of the country program (i.e., they should be site-specific); the specific M&E questions, methods, and designs to be used; what data will be collected and how; the required resources; who will implement the various components of the M&E work plan; and the timeline of the M&E plan.

Monitoring and evaluation work plans are often written to cover a four- to five-year period because they may involve numerous M&E efforts on multiple interventions for different target populations. Some of these M&E activities require time to observe intervention or program outcomes (immediate or short-term effects) as well as overall program impact (long-term effects).

Assessing How Well the Monitoring and Evaluation Plan Works

Planning an HIV/AIDS/STI Monitoring and Evaluation Work Plan is a dynamic process due to the evolving nature of the key issues, including indicators for M&E programs. Also, the contextual basis of programming changes over time. Therefore, it is important to periodically assess how well the Monitoring and Evaluation Work Plan is working, with a view toward making changes as appropriate.

Key questions to be asked to determine if an M&E plan is working include the following:

Key Questions

- Are the M&E activities progressing as planned?
- Are M&E questions being answered sufficiently? Are other data needed to answer these questions? How can such data be obtained?
- Should the M&E questions be re-framed? Have other M&E questions arisen that should be incorporated into the plan?
- Are there any methodological or valuation design issues that need to be addressed? Are there any practical or political factors that need to be considered?
- Are any changes in the M&E plan needed at this time? How will these changes be made? Who will implement them?
- Are appropriate staff and funding still available to complete the evaluation plan?

- How are findings from M&E activities being used and disseminated? Should anything be done to enhance their application to programs?

Disseminating and Using Monitoring and Evaluation Results

- The dissemination of evaluation findings can support the usefulness of evaluation *and* future activities—as well as reduce the duplication of evaluation efforts that might result if others are not aware of the findings of previous evaluation efforts. Furthermore, disseminating results enables us to teach others that monitoring and evaluation is indeed a tool for improving programs. For these reasons, a plan for how to disseminate the evaluation findings is crucial to your plan.