

# Capacity Building Workshop for CSOs “Planning, Monitoring & Evaluation (PME) Approach”

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*Facilitated by PRIA International Academy*

Planning, monitoring and evaluation (PME) are practices dedicated to the assessment of organisations overall performance. Monitoring is a systematic and long-term process that gathers information in regards to the progress made by an implemented project. Evaluation is time specific and it's performed to judge whether a project has reached its goals and delivered what expected according to its original plan. Overall, monitoring and evaluation process contribute to learning and the improvement of the work which can bring the social change.

PME is important for organisation to assess that project is achieving set targets. For instance, by monitoring the development of the project organisation will easily understand whether strategic changes need to be made and act accordingly. Second, M&E are relevant to donors who need to assess whether organisation is progressing as per the proposal. By reviewing milestones and final outcomes of projects, donors will decide on the accountability of organisation, upon which further collaborations could be established. As such, to develop a strong M&E plan is of vital importance.

A strong need is felt to build the capacity of civil society organisation on the part to improve their planning, monitoring and evaluation system. Under the project, selected CSOs from different parts of the country along with CUTS team is providing opportunity to take part in capacity building programme to strengthen their system of planning, monitoring and evaluation for effective management of projects. It will be helpful for them to smooth running of activities, better outcomes with best utilization of resources.

## Capacity Building Workshop on PME

CUTS is organising a capacity building workshop for representatives of partner CSOs who are supported from Swedish Society for Nature Conservation (SSNC) in India and selected team members of CUTS. This workshop will be delivered by expert on Planning, Monitoring and Evaluation approaches to enhance the outcome quality of programmes implemented by partner organisations. Expert/resource person will be identified from prominent institute or organisation to conduct training workshop on PME. Resource person will design training manual, training schedule and resource material, follow up activity. Workshop will be conducted for two days with minimum 22 participants.

### Objectives

- To develop an understanding of Programme Cycle Management with special emphasis on planning, monitoring and evaluation of development programmes;
- To develop competency to design a planning, monitoring and evaluation framework and mechanism for development programmes;
- To develop skills to use methods, tools and techniques to carry out planning, monitoring and evaluation of development programmes.

### Proceeding Day 1

Amar deep Singh, Senior Programme officer, CUTS International welcomed the participants and highlight the importance of Planning, Monitoring & Evaluation (PME) workshop in civil society. This workshop will strengthen the participants' capacities on PME. He said participants for workshop were coming from seven Indian states. He introduced the facilitator of workshop. The facilitator of workshop were Kaustuv Kanti Bandyopadhyay, Director, Society for Participatory Research in Asia (PRIA) and Yashvi Sharma, Senior Programme officer, PRIA.

George Cherian, Director, CUTS International, in his opening remark said that PME is important to measure a project's progress. This workshop is part of ongoing partnership with The Swedish Society for Nature Conservation (SSNC). Planning, Monitoring & Evaluation is important aspect in SSCNC Project. PME is important component in Green Action Week in India which is also supported by SSNC. Last seven years, CUTS is working on sustainable consumption with partnership SSNC. 23 Participants were coming for workshop across seven Indian states. He said CUTS is involved in development process of PME from long time. He also explained terminology Planning, Monitoring & Evaluation. Planning is route map for present to future plan. It is the process of thinking about the activities required to achieve a desired goal. It is the first and foremost activity to achieve desired results. Monitoring practice is gathering data through the research on a systematic basis. Evaluation is a process that critically examines a program. Therefore, these three

things (Planning, Monitoring & Evaluation) is very important for successful project implementation.

Kaustuv Kanti Bandyopadhyay (KKB) , Director, Society for Participatory Research in Asia (PRIA), Delhi started the workshop with introduction of his organisation and PME. He also asked Kaustuv Kanti Bandyopadhyay have taken following session in day one.

## **Session 1: Fundamentals of Project Cycle Management (including Planning, Monitoring and Evaluation – PME)**

In the development sector, a variety of projects are implemented. Apart from the development sector, the projects are also found in all areas and disciplines. The projects could be as large as building dams to a group of villagers coming together to repair a school building. Programmes are usually large and have a long-term objective, which can be broken into several projects. The projects can further be divided into tasks. In a broad sense, the project is a specific finite task to be accomplished within a specific time period. It is not relevant whether the project is large or small scale or whether long or short term. What is relevant is that the project to be seen as a unit. There are various attributes, which projects have:

- The project has a purpose.
- The project is complex and requires co-ordination between different sub-tasks and the people involved.
- The project has a life cycle like an organic entity.
- The project has clearly defined and agreed time constraints.
- The project has cost constraints.
- Every project has some elements that are unique.
- The project is focused on target group's (communities) expectations.
- The project has to be flexible to accommodate changes as the work progresses

All these characteristics of a project, highlights the essentiality of managing the project well in order to achieve its goals. This is achieved through the Project Cycle Management (PCM). PCM is a term used to describe the management activities and decision-making procedures used during the lifecycle of a programme/ project (including key tasks, roles and responsibilities, key documents and decision options).

He further added that following steps are there in the project cycle management:

- Project Appraisal
- Project Planning
- Project Implementation and Monitoring
- Project Evaluation
- Project Closure

## Session 2: Understanding Indicators for Measuring Changes/Results

An indicator is something against which to measure changes. For instance, the temperature of the air around us is an indicator of how cold or hot it is. Skin sensitivity and thermometer become tools to measure temperature. According to the definition adopted by USAID, an indicator is a variable whose purpose is to measure change in a phenomenon or a process.

In development projects, indicators are those variables, which are used as tools for monitoring and evaluating how we are doing. They are objective measures of change or results brought about by an activity, or an output from an activity. Indicators provide a standard against which to measure, assess or show progress.

There could be categories of indicators based on:

### **A. Whether process or the objective/goal of the project is to be monitored or evaluated**

Process indicators and Impact Indicators: Process indicators show whether the activities that were planned are actually being carried out effectively. They are needed to show the volume, efficiency and quality of work. While the impact indicators are needed to assess what progress is being made towards achieving the objectives and goal. For example, in a project on enhancing literacy of women, the process indicator would be, attendance of women in the classes, while the impact indicator would be increased capacity to read and write. It may be possible in any projects that process indicators are positive while the impact indicators are negative. In the above example, there could be a possibility that women's capacities are though increased but their absence from home is causing an adverse effect on the girl children since they are overburdened to take care of home and siblings. The impact indicators measure change, both positive and negative. Negative change also provides useful information, which should be taken cognizance of for planning and management. In all the cases indicators should be used to measure progress against planned objectives.

### **B. Whether the economic or social change is to be monitored or evaluated**

Quantitative and Qualitative Indicators: If an objective of a project is increased agricultural production, then yield per hectare or production per unit will be the indicator to measure the production. This is an example of economic indicator. The social impact also needs to be monitored, to assess the social change while economic indicators are generally quantifiable, the social indicators are more qualitative in nature such as level or degree of people's participation, changing attitudes and values, gender sensitiveness.

This session has group activities. In which participants have prepared the indicators for their project to measure one aspect of a program and show how close a program is to its desired path and outcomes.

## Proceeding Day 2

Kaustuv Kanti Bandyopadhyay started day 2 proceeding with recap of previous sessions. Kaustuv Kanti Bandyopadhyay have taken following session in day two.

### Session 1: Introduction to Theory of Change

Theory of Change (TOC) is a theory-based approach to planning, implementing or evaluating change at an individual, organisational or community level. An assumption is made that an action is purposeful. A theory of change articulates explicitly how a project or initiative is intended to achieve outcomes through actions, while considering its context.

A TOC allows us to organise our thoughts based on our knowledge, experience, and those conditions needed to achieve the desired change in a given context. This is partly done by making our assumptions explicit and by analysing them critically; those very same assumptions that govern our way of thinking, learning and our knowledge generation. In short, we need to make critically explicit those assumptions that we use to understand reality and, therefore, to act in it.

The approach has its roots in the 1960s, when Kirkpatrick used the model to examine the effects of training on students. It has grown in popularity in the last twenty years, partly in response to the need for a framework that can consider the complexity of multi-stranded and interrelated actions to encourage social change

KKB also discussed about Comparison between Theory of Change and Log frame.

### Session 2: Designing A Robust PME System and Involving Community in PME – Methods and Tools

If the development has to reach the poor and disadvantaged then their active engagement is essential in the development process, which aims to bring improvements in the standard of living and in the quality of life of the people. Unfortunately, many a times this engagement of people in deciding their own destiny and taking decisions which affects them remains symbolic and does not constitute real participation which involves active engagement of people with policy makers, planners and implementers of the programme.

Development is a process, which begins with identifying the development problem and doing something about it. Monitoring and Evaluation (M&E) is one management tool, which can help to improve the process. M&E systems answer questions of:

- **Relevance** (does the project address the needs)
- **Efficiency** (are the resources wisely used)
- **Effectiveness** (are the desired results achieved)
- **Impact** (to what extent the project activities have brought about changes for the betterment of individuals and communities, any other unforeseen or unintended changes that may have resulted)

KKB discussed about comparison between Traditional Monitoring and Evaluation and Participatory Monitoring and Evaluation. History of Participatory Monitoring and Evaluation were discussed. PME serves five general functions:

- PME for impact assessment
- PME for project planning and management
- PME for organisational strengthening and institutional learning
- PME for understanding and negotiating stakeholders' perspectives
- PME for public accountability and policy

There are six major steps involved in PME:

- Planning the process: Identification of objectives and issues
- Identifying indicators
- Identifying actors and their roles in collecting the information
- Data collection
- Data analysis
- Data presentation, documentation and sharing

Yashvi Sharma, Senior Programme officer, PRIA presented the various tools and methods of PME. She also presented short film related to PME methods and community participations.

## **Vote of Thanks**

George Cherian thanked participants and PRIA International. He said this workshop is introductory workshop. However, in future CUTS will organised the advanced level PME workshop. He also thanked to the Swedish Society for Nature Conservation for the support to organise the workshop. He also requested participants to use the PME approaches for at least one ongoing project.

## List of Participants

S.No.	Name	Organisation's Name
1	Amit Kumar	Kumarappa Institute of Gram Swaraj (KIGS)
2	Bibhu Prasad Sahu	Youth for Social Development (YSD) Berhampur, Ganjam, Odisha,
3	Danesh Kumar	Rural Agency for Social and Technological Advancement (RASTA), Wayanad, Kerala
4	Gauhar Mehmood	CUTS CHD, Chittorgarh, Rajasthan
5	Himani Tiwari	City Managers Association of Rajasthan (CMAR), DLB Department, GoR
6	John Packiaraj	Peace Trust, Dindigul, Tamil Nadu
7	Kavita Mishra	CECOEDECON, Jaipur, Rajasthan
8	Prashant Singh	Urmul Trust Bikaner, Rajasthan
9	Palashka Jha	SPECTRA, District Officer-Jaipur
10	Sanjay Sharma	Anmol Foundation, District- Uttar Bastar- Chhattisgarh
11	Sucharita Bhattacharjee	CUTS CRC, Kolkata
12	Sangeetha E Nikkam	Public Affairs Centre (PAC), Bengaluru, Karnataka
13	Amar Deep Singh	CUTS CART, Jaipur, Rajasthan
14	Amit Babu	CUTS CART, Jaipur, Rajasthan
15	Deepak Saxena	CUTS CART, Jaipur, Rajasthan
16	Dharmendra Chaturvedi	CUTS CART, Jaipur, Rajasthan
17	George Cheriyan	CUTS CART, Jaipur, Rajasthan
18	Jithin Sabu	CUTS CITEE, Jaipur, Rajasthan
19	Madhu Sudan Sharma	CUTS CART, Jaipur, Rajasthan
20	Nimisha Sharma	CUTS CART, Jaipur, Rajasthan
21	Rajdeep Pareek,	CUTS CART, Jaipur, Rajasthan
22	Satyapal Singh	CUTS CART, Jaipur, Rajasthan
23	Sarthank Shukla	CUTS CCIER, Jaipur, Rajasthan

## Glimpses of Workshop

