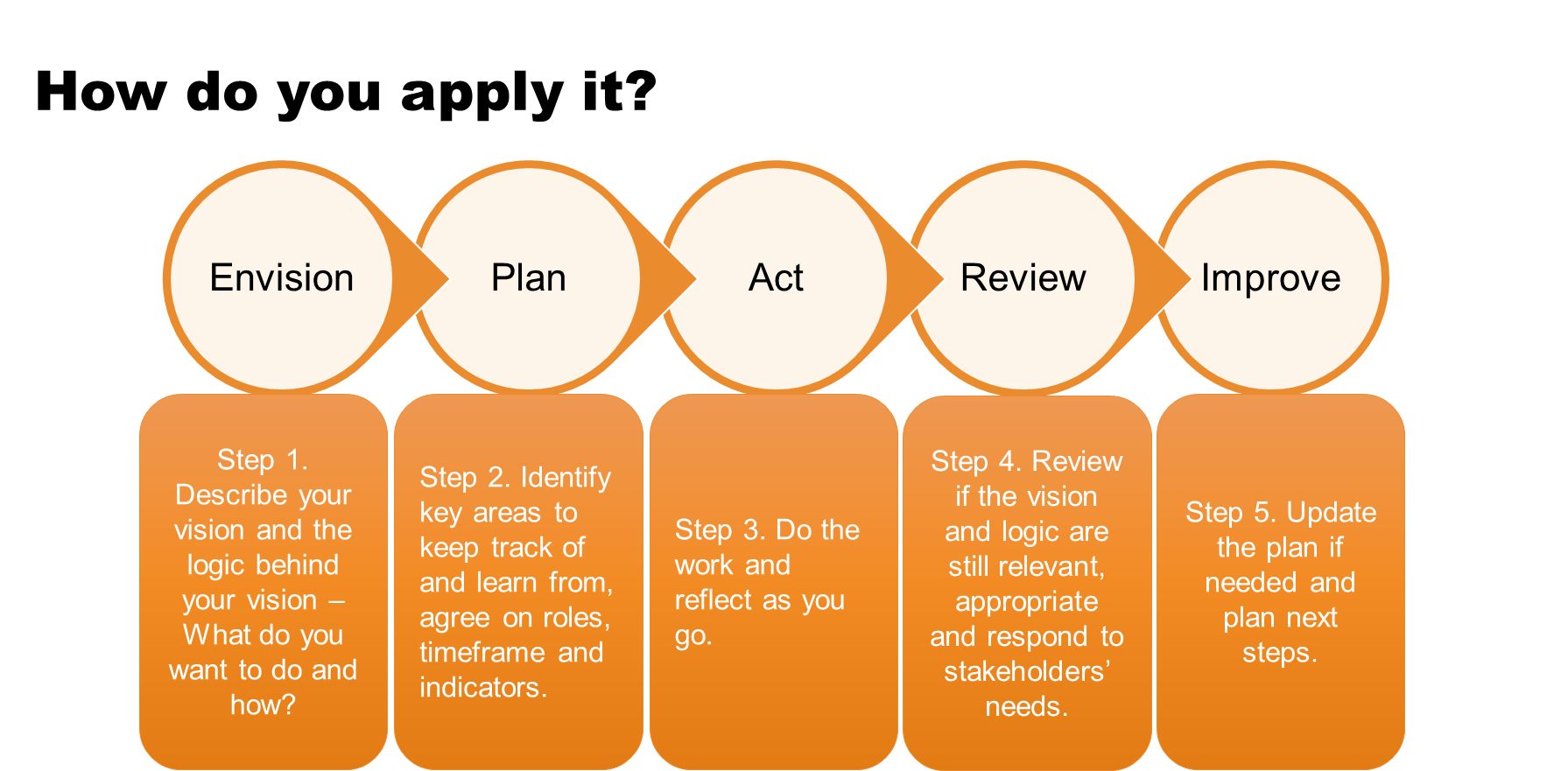
**Tool 1. Monitoring and Evaluation – Tracking progress and change**

This tool comprises 5 steps as follows:

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Answer the questions in the next pages to build a simple yet useful monitoring and evaluation (M&E) plan to track progress.

You can get back to this M&E plan and update when needed.

In the **Appendix** you will find a fillable ‘Vision map’ that you can use to start jotting down ideas about your plan or simply write your answers in the following pages.

**Step 1. Envision. Describe your vision and the logic behind your vision – What do you want to do and how?**

|  |  |
| --- | --- |
| **Questions** | **Your answers** |
| LONG TERM IMPACTS: VISION OR ASPIRATION:   * What is your long term vision or aspiration for the future? * What impact do you want to make on the world, your community, your country, etc.?   Tip: Keep it high and aspirational |  |
| LONG TERM OUTCOMES:   * What has decreased, increased or improved in the long term? |  |
| MEDIUM TERM OUTCOMES   * What has decreased, increased or improved in the medium term? |  |
| SHORT TERM OUTCOMES   * What has decreased, increased or improved in the short term? |  |
| ISSUES: PROBLEMS OR OPPORTUNITIES   * What are the current issues, problems or opportunities that your will tackle? |  |
| RESOURCES   * What do you need to make the activities happen? * For example, what people capability and skills do you need? What financial resources would you need and for how long? |  |
| ACTIVITIES   * What are you going to do? When? With whom? * For example, hui, workshops, field visits, experiments, interviews |  |
| TANGIBLE RESULTS   * After you completed your activities, what have you produced? |  |
| ASSUMPTIONS   * What are your assumptions to achieve your outcomes? For example:   + Are your stakeholders well informed and involved? Are they on board?   + If not, what can you do to involve them? |  |
| RISKS   * What are some risks of doing or not doing the activities or achieving results? * What can prevent you from achieving results? For example:   + Do you depend on legislation to be approved?   + Are there any resources (financial, people, time) that could be a problem? |  |

**Step 2. Plan. Identify key areas to keep track and to learn from, agree on roles, timeframes and indicators – What, who, how, when?**

|  |  |
| --- | --- |
| **Questions** | **Your answers** |
| KEEPING TRACK OF OUTCOMES   * Who is in charge of keeping track of outcomes? * When will you meet to keep track of outcomes? E.g. at annual, quarterly, or monthly meetings or specific project monitoring meeting * What indicators will you use?   + Quantitative indicators, e.g. financial resources investment, hectares of land restored, number of trees planted, water quality index, catchment maps, statistics on population, unemployment, income, etc.   + Qualitative indicators, e.g. group perception on how well a plan is accepted by the community, cultural health index, etc. * What tools you will use to keep track of outcomes? e.g. annual ‘reflection’ sessions, reports, minutes, action points, interviews with stakeholders or informed persons, community meetings. |  |
| KEEPING TRACK OF ACTIVITIES   * Who is in charge of keeping track and how often? * What tools you will use to keep track of activities? (e.g. surveys, reports, interviews, etc.) * What areas are you going to keep track of? For example:   + How effective the activity was in achieving its objectives?   + How appropriate the activity was for the people involved?   + What can be improved? |  |
| KEEPING TRACK OF RESOURCES   * Who is in charge of keeping track and how often? * What tools you will use to keep track of activities? (e.g. financial statements, people’s availability, social networks, etc.) * How are you going to keep track? For example:   + Do we have enough resources to deliver?   + If not, what resources are needed and how and when they will be available?   + If they are not available, what is plan B? |  |

**Step 3. Act. Do the work and reflect as you go**

* + Do the work
  + Document lessons as you go using the ‘ORID’ guiding questions:
    - **O**bjective: What happened?
    - **R**eflective: How did you feel about the issue/experience?
    - **I**nsights: What does it mean? What are the key messages?
    - **D**ecision: So what action do we/can we take as a result?
  + Minutes of meetings can also be a learning tool if they include: planned steps, actions, observed impacts
  + Most importantly, ‘Reflection time’ needs to be built into the calendar.

**Step 4. Review. Review if the vision and logic still relevant, appropriate and responds to stakeholder’s needs**

* + Does the vision still make sense or do you need to update or modify?
  + What have you learned?
  + What needs to change?

**Step 5. Improve. Update the plan if needed & plan next steps.**

* + You might find that you need to change your plans or experiment with new ways of doing things if what you’re doing isn’t giving you the results you want.
  + Adjust your plan based on your review in Step 4.
  + Agree on next steps.

**Risks**

**Appendix. Vision map (logic framework)**

M&E

M&E

M&E

**Assumptions**

M&E

M&E

M&E

**Long term impacts (Vision or aspirations)**

**Issues: Problems or opportunities**

Activities

Tangible results

Resources

Long term outcomes

Medium term outcomes

Short term outcomes

LONG TERM OUTCOMES

RESOURCES

TANGIBLE RESULTS

ACTIVITIES

**ISSUES: PROBLEMS OR OPPORTUNITIES**

**RISKS**