**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**