Monitoring and Evaluation (M&E)

These core competencies can be used together with the [TOPS Self-Rating Tool](https://www.fsnnetwork.org/sites/default/files/TOPS%20Self%20Assessment%20Tool%20Dec%202017.xlsx) to adapt the TOPS Self-Assessment Toolkit to your needs.

M&E Manager

The title “M&E manager” refers to the position in charge of the monitoring and evaluation (M&E) of a food security project; the actual job title of the position may vary by project or by organization. The M&E manager leads M&E strategies for large-scale food security projects or country offices implementing food security interventions. The position is based at project/country office headquarters. The M&E manager provides oversight and management of M&E and/or data management officers who carry out data collection.

The M&E manager’s core competencies include:

1. M&E concepts
2. Project design
3. Developing and operationalizing a project M&E system
4. Sampling for qualitative studies and quantitative surveys
5. Data quality management for all data collection activities
6. Qualitative techniquesfor monitoring
7. Quantitative techniques for data collection
8. Data analysis
9. M&E capacity building
10. Evaluation design
11. Techniques for presenting information

# M&E Concepts

## Understand basic M&E concepts and the purpose of M&E.

## Be able to clearly define the project cycle and results chain: needs and capacities assessment, problem analysis, developing a conceptual framework or Theory of Change, selecting and implementing activities, outputs, outcomes, impact.

## Understand and interpret the Results Framework (RF), M&E plan, Performance Management Plan (PMP), and Indicator Performance Tracking Table (IPTT).

## Possess knowledge of indicators, strategies, and tools for tracking project progress and bottlenecks and to achieve cross-cutting objectives, including gender and environment.

## Understand the concept of participatory monitoring.

## Understand the concepts and approaches of impact evaluation.

## Know how to plan for and use mixed research methods.

## Understand the fundamental concepts of data quality assurance and pitfalls.

## Be familiar with environmental indicators and initial environmental assessments.

# Project Design

## Diagnose and assess needs and opportunities.

## Carry out causal (problem) analysis and objective hierarchy.

## Map out a project/program Theory of Change or Development Hypothesis.

## Carry out gender assessment studies and analyses with the help of gender specialists.

## Carry out market assessment studies.

## Identify performance indicators and tools to inform managers and program staff about the progress toward program objectives and to encourage management to integrate them into the project deigns; develop report formats and schedule for reporting.

## Determine activities, outputs, outcomes, and impact.

## Develop an RF and/or logistical framework (log-frame).

# Developing and Operationalizing a Project M&E System

## Develop a comprehensive M&E plan, including:

### IPTT and PMP

### Program- and context-specific indicators, with the help of sector specific technical staff

### Indicators and tools to measure cross-cutting objectives (i.e., gender, environment)

### Qualitative and quantitative methods and tools for data collection and analysis

### Performance Indicator Reference Sheet (PIRS)

### Description of M&E activities, including supervision, monitoring (of M&E), and data quality assessment strategies

### M&E calendar/timeline

### Data collection instruments

### Data quality assurance plan

### Communication strategy

### M&E budget

## Select M&E staff to collect and/or supervise data collection and use.

## Assess/monitor community participation in and satisfaction with implementation, monitoring, and evaluation (including protection issues) activities.

## Determine strategies to help managers and technical specialists make evidence-based programmatic decisions/develop a data use plan.

# Sampling for Qualitative Studies and Quantitative Surveys

## Know how to design a sampling strategy using probability and or purposive sampling methods.

## Know how to calculate sample size.

## Know how to develop the sampling frame and draw samples.

# Data Quality Management for All Data Collection Activities

## Develop and implement strategies to improve data quality.

## Design a data flow diagram and identify bottlenecks.

## Develop and manage tools and methods for assessing data quality for all indicators.

## Design and implement an internal data quality assessment.

# Qualitative Techniques for Monitoring

## Identify indicators for qualitative monitoring.

## Develop topical outlines/key topics to facilitate discussions to guide data collection.

## Design qualitative monitoring tools and methods.

## Use qualitative data:

### To interpret quantitative data

### To inform quantitative data collection design (e.g., data to collect, coded responses)

### To verify quantitative data

### For exploratory, open-ended inquiry

## Possess skills in using and monitoring/supervising the use of key qualitative tools, including:

### Key informant interviews

### Focus group discussions

### Use of direct observations as an M&E tool

### Commonly used interactive tools (maps, matrix, calendars)

# Quantitative Techniques for Data Collection

## Design/revise tools for routine monitoring data collection.

## Develop protocols for routine monitoring and surveys.

## Collect physical measurements (i.e., anthropometric, infrastructure)

## Understand how to design instruments on mobile platforms (e.g., smart phones, iPads, iPods)

## Possess skills in using Geographical Information Systems (GIS) in M&E.

## Design structured surveys, including:

### Questionnaire design and testing

### Employing strategies to minimize sampling and non-sampling errors

### Interviewing techniques

### Training and coordination of enumerators

### Supervising/testing the validity and reliability of data in the field

## Manage surveys, including:

### Logistics planning

### Gathering required information to construct the sampling frame

### Designing and facilitating training for enumerators

### Overseeing data collection

# Data Analysis

## Develop a data analysis plan.

## Understand the difference between descriptive and inferential statistics.

## Conduct quantitative data analysis, including:

### Creating indices and computed indicators

### Designing a data entry application for survey data using common software applications (e.g., MS Access, CSPro, SPSS, EpiInfo)

### Using and interpreting frequency tables, bivariate cross tables, t-tests, confidence intervals, multivariate analysis, correlations, skewness and kurtosis

### Designing a data entry application for routine monitoring data using MS Excel

### Cleaning data using standard acceptable techniques

### Analyzing quantitative data using data analytic software (e.g., SPSS, STATA, EpiInfo, Nutrisurvey, SAS)

### Analyzing routine monitoring data using computer packages (i.e., MS Excel, MS Access)

### Analyzing and reporting quantitative data

### Interpreting statistical data to inform decision-making

## Carry out qualitative analysis, including:

### Descriptive, content, inductive, logical analysis

### Synthesizing and reporting qualitative information

### Use GIS data.

# M&E Capacity Building

## Assessing skill gaps of the M&E staff.

## Designing training to improve skills based on the identified skill gaps.

## Organizing/ facilitating skills training.

## Coaching/mentoring staff to improve skills.

## Designing and providing on-the-job training to improve skills.

## Assessing the knowledge change of participants.

# Evaluation Design

## Design evaluation questions and methods.

## Develop criteria for when and how to use control and comparison groups.

## Develop terms of reference for baseline and final evaluation surveys.

## Review tools/instruments and field manuals developed by the survey contractor.

## Review qualitative tools and methods to be used in the baseline and final evaluation surveys.

## Develop terms of reference for a mid-term evaluation.

## Collect and provide data to the evaluators to construct a sampling frame.

## Incorporate evaluation data collection into the M&E design.

# Techniques for Presenting Information

## Know how to write narrative reports.

## Know how to write executive summaries.

## Know how to create and use tables in reports and presentations effectively.

## Know how to create and use graphs and charts in reports and presentations effectively.

## Know how to develop and present case studies in reports effectively and responsibly.

## Know how to collect and use quotations in reports effectively and responsibly.

## Know how to present and use statistics effectively and responsibly.

## Know how to make clear and effective oral presentations.

## Know how to design and effectively use PowerPoint presentations.

## Know how to develop and present success stories effectively.

# Notes on Program Implementation:

* The M&E manager is not responsible for developing the M&E budget on his/her own, but with the support of headquarters and technical staff.
* While M&E managers should propose the sampling frame, in most cases additional specialist support may be needed for sample size calculation and developing sampling strategies, even for M&E managers.
* Where an external consultant is required (i.e., in final evaluations), M&E managers will work with the consultant to ensure that all required data for the evaluation is collected as per the M&E plan. At the same time, the M&E manager will ensure that data required to answer key questions needed to fulfil the evaluation’s terms of reference are included in quantitative surveys and qualitative studies.
* While the M&E manager or data analysts conduct statistical data analysis, the analysis is sometimes reviewed by others to ensure quality and accuracy.
* Though USAID now requires evaluations to be done by external consultants still, management of the whole process needs to be done internally. A lot of logistics need to be coordinated during the process, whether the organization/project is carrying out a survey, a qualitative study, or both. M&E managers need to know their role in this process so they can manage it successfully. This should be clearly outlined during the evaluation design.
* While activities under “11. Techniques for Presenting Information” are conducted in collaboration with others, such as the program manager, technical specialists, and/or consultants, report writing is a key role of the M&E manager, as he/she must be able to tell the organization/project’s story to donors and others.

The Technical and Operational Performance Support (TOPS) Program is the U.S. Agency for International Development (USAID) Office of Food for Peace-funded learning initiative, bringing the highest quality information, knowledge, and promising practices in food assistance programming to implementers and donors around the world to ensure more communities and households benefit from the U.S. Government’s investments to fight global hunger.

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