Indicator Monitoring in International Cooperation

5 Tips to Overcome Common Challenges

Many monitoring systems don't run as smoothly as they could, especially when it comes to quantitative indicators. Some systems are associated with challenges, overburdening, sometimes demotivating staff and conveying unnecessary and contradictory data. More frankly, indicator systems may turn into quite a mess and become a source of struggle for programs[1]. Many program managers and M&E experts will be able to relate to this. But why is it the case and what can be done to avoid it?

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In this brief **5 simple tips** are formulated, hopefully aiding program staff to coexist peacefully with their monitoring indicators. At the same time this guidance will help to ensure data are consistent for reporting and, most importantly, the indicators become a source of information for program steering (and maybe even learning).

1. Do not overload the Monitoring System – make choices, be realistic and pragmatic.

What often happens when developing programs is you list everything somehow measurable in the logframe's second column – the indicator column. Many indicators make it look good, right? Having done that, you usually move one column to the right and add the means of verification crossing your mind. Often not sufficient time is dedicated to this exercise, as one has tight deadlines and developing other aspects of the program is already very time consuming. Further, everyone part of the development process tends to add what they find important. Your indicator list will end up being the sum of all indicators the involved persons find relevant. This is easier and less time intensive than drawing a conclusion as a team on what is vital by deliberating on each indicator. But attention, this will become incredibly time consuming when it comes to reporting.

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Be aware that your indicators cannot and do not need to measure every aspect and dimension of your program. Do not make an indicator for each activity. Many things can easily be tracked with your financial report or activity records, such as attendance or distribution lists, and do not need to show up in your logframe. If you overload your monitoring system with too many indicators, this will likely reduce the overall quality. Simply because you will not have the time and energy to measure every indicator with the level of rigor required to ensure data are consistent. At the same time, the reader of your logframe report will lose the overview because it becomes unclear what information is important.

[1] For this brief, when we write "program", this shall include any administrative entity used to structure development or humanitarian interventions. Hence, "program" can be used interchangeably with "project" throughout this brief.

Think of a card house. Every additional card you put on the card house increases its instability. At some point the card house becomes too instable and collapses. On the contrary, a card house with only few and well-placed cards can be quite stable and even withstand a shaking table. Your monitoring system needs to be equipped with only few, well-chosen indicators. **Less is more**. The following decision aid may help for discussions about which indicators to measure: If you are not 100% convinced of an indicator's relevance and not 100% sure if it will be used for program steering or reporting – drop it!

Bearing this in mind, invest some time to discuss or reflect which indicators you agree are important. This reasoning will help you define and decide what is actually crucial about your program. If you do this in a group, even better, as this will enrich common understanding among the program team. Reserve some time, take a step back and ask yourself for every indicator:

- ☐ Is this indicator important? If yes, do we all agree that it is?
- ☐ Can we actually measure it (in practical terms)? How will we go about in measuring it?
- ☐ Are the concepts clear or do we need to invest more time (at a later stage) to clarify the underlying concepts? If yes, are we ready to invest this time, or should we rather invest it elsewhere, and thus choose a simpler indicator?
- ☐ Does the indicator actually measure the associated output and outcome statement? Is there a consistent link between statement and indicator?

You have to make choices on what to measure, be pragmatic and realistic!

You mustn't go into every detail at this stage. The idea is rather to ask yourself some key questions – do a quick reality check - before you finalise your program logframe. You have to make choices on what to measure, be pragmatic and realistic! You may also ask these questions in a small group exercise by involving key people. If you have an M&E team do involve them at this stage. It also helps to involve a person who hasn't been part of the program development process so far and is thus somehow neutral and can critically ask if what you intend to measure is reasonable. If that person has some M&E affinity, even better.

2. Outcome vs. Output indicators.

There is often a mix-up between outcome and output levels. It makes sense to measure outputs and outcomes differently. Follow this simple guidance[2]:

Often outcome (and impact) indicators are well suited to be presented as percentage (%) values. Percentage values consist of a numerator and denominator. The denominator is the target population of the program and the numerator the persons among the target population fulfilling a certain criterion.

$$\frac{\text{Persons fulfilling indicator criterion}}{\text{Target population}} \text{ x } 100 = \% \text{ indicator value}$$

[2] For examples related to the remainder of this chapter, do refer to this example M&E plan template we developed for a PCM training Interaction held in 2022.

%-indicators measure the "state" or "situation" in your target population (i.e. the people or households you work with) and usually need to be collected with (household) surveys. By comparing measurements across time, you can track the changes in your target population. On the other hand, there are also few instances where number (#) indicators may be better suited at outcome level. This is especially the case, if your indicator is not about people or households and their "state" or "situation". For example, you may want to track "# of policy changes" or "# of Civil Society Organisations with policies being applied". There is no one size fits all here and the framing of your indicator really depends on your logframe statement, how you want to measure it and what you want to show and emphasise.

Attention, usually a (full) claim of attributability between your program and the outcome indicator change cannot be made. This is simply the nature of a program outcome – they are never in full scope of a single program, as there are other contextual factors leading to the outcomes too. Collect comparison group data or conduct an (impact) evaluation if you want to be entirely sure if your program contributed to a certain outcome-indicator. Plan for comparison group data collection only if you can realistically do it in terms of time and budget. Do note that in some cases there will be no comparison groups at all. For example, you will not find one for "policy changes", but you will definitely find one for "disease prevalence in a population".

Output level indicators are best measured by a simple number (#). Usually, it makes sense to count or "quantify" the output of your core or main activities. Refrain from counting all activities. As outputs are the direct result of your activities, there is usually full attributability between your program and the indicator achievement. Output indicators are not meant to measure a change in the target population, but rather the delivery of goods and services: How many persons attended a training? How many persons received a food kit? How many water sources were built?

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Lastly, be aware not to forget qualitative monitoring methodologies, such as Rating Indicators, Outcome Harvesting[3] or Most-significant Change[4] to capture things your quantitative indicators cannot capture. Qualitative methods are much better at capturing "complexity" and unintended consequences of your program, while quantitative ones solely capture "linearity" and what you intend to achieve. Qualitative methods can go much more in depth, highlighting underlying mechanisms, but they are usually not representative, in statistical terms. If possible, leave room for structured qualitative methods, at the cost of less quantitative indicators. You will see these qualitative methods enrich learning and mutual understanding much more.

3. Come up with a thorough Monitoring Plan early on.

Once you have set your indicators as part of your logframe, it is time to nail down all the details and conceptual nitty gritty. For Interaction's PCM training we developed a detailed template for an **M&E plan**[5]. Have a look, it should be self-explanatory. Do not hesitate to reach out to us with any questions. The Means of Verification (MoV) column in your logframe can be elaborated simultaneously with the M&E Plan. The latter is simply a very detailed elaboration of the former.

[3] For more on this method see here: INTRAC 2017. Outcome Harvesting. Retrieved 06.12.22.

[4] For more on this method see here: INTRAC 2017. Most Significant Change. Retrieved 06.12.22.

[5] You can find the practical M&E plan template here. Feel free to use it and adapt it to your needs – some programs will require all the details (columns) while other can live with less information.

When elaborating your M&E plan make sure all relevant stakeholders are involved: operational staff, M&E staff, partner staff, program participants. Only if the M&E plan is owned by all relevant stakeholders and mainstreamed throughout your program, can it really unfold its full potential. You may notice that some indicators will be really difficult to measure or are not fit for the intended purpose, in this case you will need to go back to your logframe and revise – it will be a back and forth. If you have already done the reality check described in chapter one, you will save time now. At this stage, you will also need to think about the finances you need to realise your indicator measurement. By elaborating the M&E plan this will become very concrete. Make sure you have made a realistic allocation accounting for all the involved steps. You can see that solid indicator monitoring requires time and budget. It is just so much easier and cost-effective if you have defined only a few clear and crucial indicators.

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If you have followed tips one to three in this brief, you're a good to go and submit your logframe to your donor or for internal approval. The M&E Plan will mostly be an internal document although some donors have started asking for it.

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But you are not finished with your M&E Plan yet. After each data collection, go back to it and update it. You may need to revise some definitions here and there. Ensure everyone has access to the same version of the M&E plan. It is usually helpful to store it somewhere on your SharePoint or Google Drive.

4. Develop data collection tools during inception.

After project approval, invest some time in devising the data collection tools you defined in the M&E plan. In some cases, they will already be available, whereas in others you need to develop them from scratch. Ensuring all stakeholders who are part of the data collection process have the same tools and know how to use them is essential.

As a rule of thumb, usually randomly sampled household surveys are best to measure outcome indicators, although there will be exceptions. For surveys you will need household questionnaires. You can develop them digitally by using **KoboToolbox**, for example. For output indicators you will usually use existing program implementation tools, such as training attendance lists, distribution lists or other activity records. If possible, collect data from unique individuals or households. This means you setup a list with names of your participants and the activities they benefited from.

	Received food kit	Participated in training	…
Person 1	Yes	No	
Person 2	No	No	
Person 3	Yes	Yes	
…			

This is the only way to eliminate double counting of persons. Some organisations use sophisticated digital tools to track different aspects for each individual or household they work with. They basically keep an "account" for every individual, what s/he received, attended, when, etc.

5. M&E should be part of every job description.

Larger organisations usually have M&E teams supporting operational or program teams. This may lead to a "hands-off mentality" by operational or program teams on M&E-related issues. Unless M&E is owned by them it cannot work. M&E will only become useful for program management and learning, if the people taking decisions and implementing programs are involved in the related processes. M&E teams can advise, do quality assurance, or lead on more technical issues, but operational staff must always be involved thoroughly.

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By living up to this it will become easier to follow the four other tips above. It will be simpler to come up with the right indicators, develop an M&E plan and data collection tools, while not overloading the system and deciding what is actually important. Less is just so much more when it comes to rigorous M&E. I hope by realising the tips in this brief you will soon love your indicators as much as we do.

Learn more about Interaction's international programme *Learning 360*:

- # Programme Overview – German & French
- # How we understand Impact – German & French

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