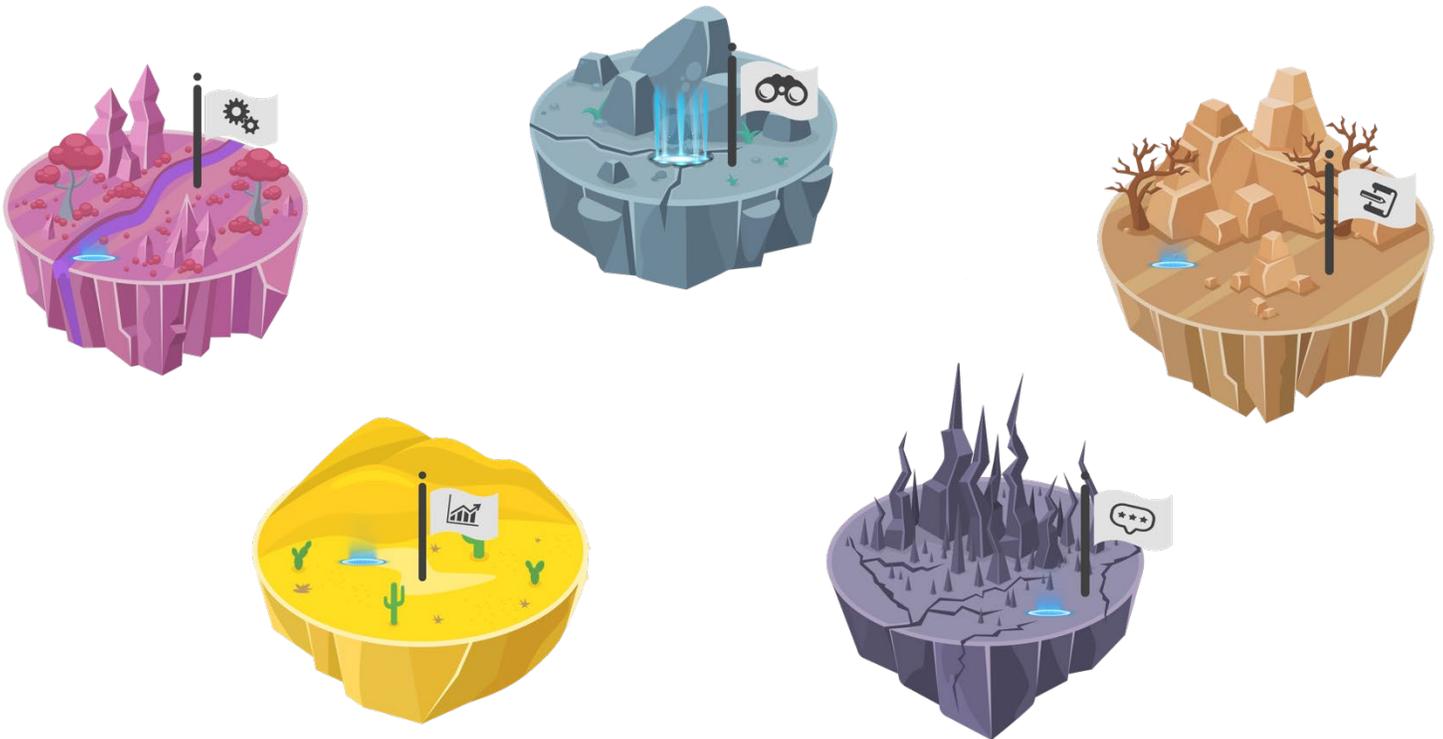


Course Handbook: Results-Based Management 101



About the Handbook

This handbook comprises the main content of Spur Change's [RBM 101 Practising Results-Based Management: An Introductory Course](#). It covers basic RBM concepts and ways RBM can be applied. It provides participants with case studies and exercises using basic RBM tools. This handbook is an adaptation from the self-paced course, which means that only selected content is included.

The objective of the handbook is to provide course participants easy access to the course materials and specific sections after completion, without having to re-do the course. The handbook aims to reinforce the learning by making the content available when a former course participant needs to apply RBM.

The handbook has been prepared by the Spur Change program team.

Credits and Copyright

This **Results-Based Management 101 Course Handbook** is inspired by the RBM 101 Practising Results-Based Management: An Introductory Course, which has been developed by Spur Change in collaboration with Le Groupe Baastel and Octo D.

[Spur Change](#) is a program of the Inter-Council Network of Provincial and Regional Councils for International Cooperation (ICN) implemented by one of its members the Alberta Council for Global Cooperation. Spur Change aims to increase the effectiveness of Canadian small and medium organizations (SMOs) to deliver sustainable results by offering learning and networking opportunities. Spur Change is funded by Global Affairs Canada.

[Octo D](#) is a multilingual, e-learning architect. Their training sessions are pedagogically effective, easy to use and visually captivating. They serve organizations that care about skill development and are excited about their involvement in the community.

[Baastel](#) is a Canadian-owned consulting firm with a global presence and three decades of experience across a broad range of sectors and services. Committed to just and sustainable development for all, Baastel supports decision-makers and stakeholders from grassroots to government, providing knowledge, skills, systems, and tools to enhance their impact.



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Glossary

Activities

The specific tasks to be undertaken during a project's life in order to obtain outputs.

Baseline

A baseline is the starting point from which to measure change over time. It refers to the existing situation related to each result before project activities begin.

Benchmark

Reference point or standard against which progress or achievements can be assessed often using a set of criteria.

Cross-cutting issues

Cross-cutting issues are topics that affect all aspects of a program (i.e. cut across) and therefore need special attention. They should be integrated into all stages of programs and projects, from planning through to impact assessment – but this has not always been the case.

Disaggregating (indicators)

Breaking down a unit of analysis according to a significant category or characteristic.

Evaluation

Evaluation is the systematic and objective assessment of an on-going or completed project, program or policy, its design, implementation and results. The aim is to determine the relevance and fulfilment of objectives, development efficiency, effectiveness, impact and sustainability.

Gender Equality

Gender equality, also known as sexual equality or equality of the sexes, is the state of equal ease of access to resources and opportunities regardless of gender, including economic participation and decision-making; and the state of valuing different behaviors, aspirations and needs equally, regardless of gender.

Impact

Positive and negative long-term effects on identifiable population groups produced by a development intervention, directly or indirectly, intended or unintended. These effects can be economic, socio-cultural, institutional, environmental, technological or of other types.

Indicators

A quantitative or qualitative measure of program performance that is used to demonstrate change and which details the extent to which program results are being or have been achieved.

Inputs

The financial, human, material, and information resources used to produce outputs through activities and accomplish outcomes.

Logic Model

Sometimes also called a "results chain", it is a depiction of the causal or logical relationships between inputs, activities, outputs, and the outcomes of a given policy, program or investment.

Monitoring

Monitoring is the systematic collection and analysis of information as a project progresses. It is aimed at improving the efficiency and effectiveness of a project. It helps to keep the work on track and let you know when things are going wrong.

Outcomes

The intended or achieved short-term and medium-term effects of an intervention's outputs.

Output

Outputs are new products, goods and services or changes in skills and capabilities of individuals or institutions that result from the completion of activities within the control of the Organization.

Performance Measurement Framework (PMF)

A performance measurement framework is used to systematically plan the collection of relevant data over the lifetime of an investment to assess and demonstrate progress made in achieving expected results. It also serves as a monitoring tool containing eight columns and focuses on indicators for measurement, baseline, targets, who is responsible for monitoring, when will monitoring be done, where will data come from and what methodologies will be used to monitor and collect data. It serves as the overall monitoring plan for projects or programs.

Results

Results are the expected changes which are demonstrable and that are to take place during the project/program life.

Results-Based Management (RBM)

RBM is a team-based and participatory approach to management that focuses an organization's or a project/program's efforts on expected results. It is a type of performance management and measurement strategy that is used by most donor agencies to ensure enhanced accountability and learning in project/program implementation.

Target

An explicit statement of the desired and measurable results expected for an indicator at a specified point in time. Targets should be expressed in terms of quantity, quality and time.

Theory of Change

Representation of how an initiative is expected to lead to desired results.

What is RBM?

Results-based management, or RBM, is a management approach designed to improve project and program design, implementation, monitoring, learning, reporting, and accountability in any project or program in any sector or sphere.

The central concept of RBM is that everything we do in project management should be focused on **results**. Results, in RBM, are **observable changes** that can be described or **measured**. They are changes that can be **attributed to an identified cause-and-effect relationship** - that is, we know why the change happened.



The RBM approach integrates all project elements - strategies, people, resources, monitoring, and reporting - over the entire life cycle of a project, through a continuous focus on desired results.



The RBM approach is put into practice through a set of **basic tools**.

Course Objectives

In this training, you will have the opportunity to learn about the basic RBM concepts, see how RBM can be applied.

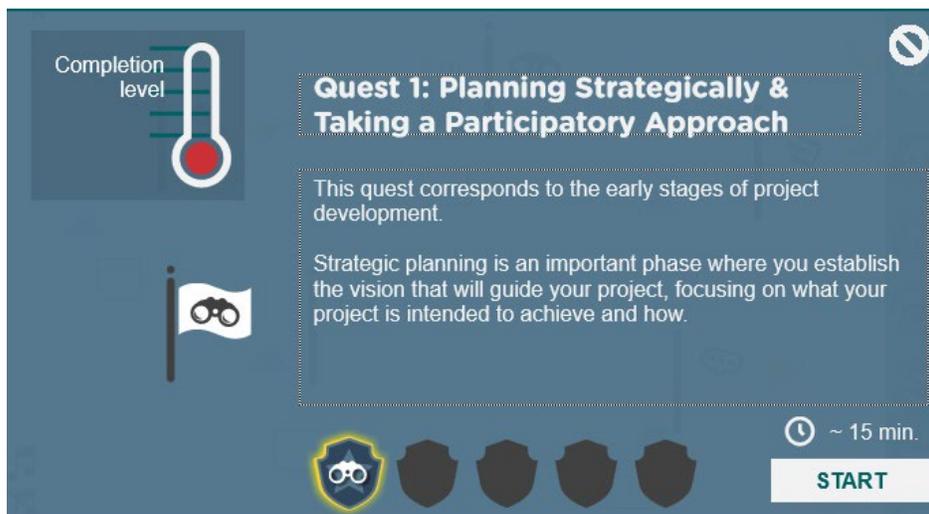
To help you see the concepts and tools in action, you will follow the story of a fictional organization called Peace & Play as they develop a project and associated RBM tools. You will also see examples and review the course exercises based on real-life case studies.

Structure

This training is organized into five sections represented by **5 islands from the Peace & Play world**.

These are your quests:

1. Planning Strategically and Taking a Participatory Approach



Completion level 

Quest 1: Planning Strategically & Taking a Participatory Approach

This quest corresponds to the early stages of project development.

Strategic planning is an important phase where you establish the vision that will guide your project, focusing on what your project is intended to achieve and how.



 ~ 15 min.

START

2. Organizing the Desired Results into a Logic Model



Completion level 

Quest 2: Organizing the Desired Results into a Logic Model

This quest focuses on results – the building blocks of RBM – and how to build these into a fundamental RBM tool: the logic model.

The logic model builds on your theory of change, zooming in on the specific results that make up your project and showing the logical connections between them.



 ~ 75 min.

START

3. Monitoring for Results



Completion level 

Quest 3: Monitoring for Results

This quest focuses on the activities that help you learn whether and how your project is making progress towards results your organization defined in the Planning phase.

This phase is called *Monitoring*.

Monitoring involves collecting and analyzing information as your project progresses in order to improve its efficiency.



 ~ 60 min.

START

4. Reporting



Completion level 

Quest 4: Reporting

This quest is tied up with the previous one: *Monitoring for Results*.

Once you have planned for and collected your data for all your indicators, it's time to analyze your results.

You will also need to communicate these results to stakeholders, donors, communities, potential donors and others for accountability, learning, fundraising or other purposes.



 ~ 15 min.

START

5. Learning



Completion level 

Quest 5: Learning

This quest is linked to the two previous ones: *Monitoring for results and Reporting*.

In RBM, you incorporate planned learning activities across the project cycle in order to continuously improve the current project and gain experience that can inform future projects. Ongoing reflection on your results and monitoring data is essential.



 ~ 15 min.

START

Meet Peace & Play



Each quest starts with Peace & Play! You'll see a story featuring the team at work.

Then you'll see the quest - or, in more classic terms, the module's objectives. We'll situate the quest in the overall project management cycle.

Review course **exercises**.

Refer to the **glossary** at the beginning of the document for the most commonly used terms in RBM.

Find some useful **resources** for further exploration on the topic at the end of the handbook.

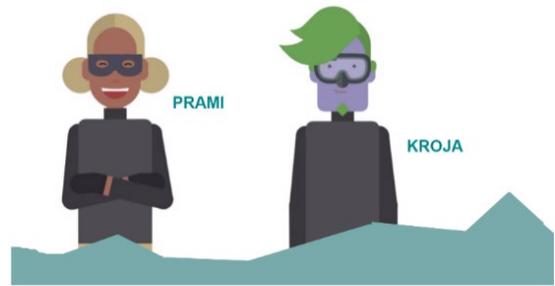
Peace & Play is a fictional organization, located in a world that is distant from our own in time and space.

It's a beautiful world, but it has global problems that require people from all its regions to work together to face. Unfortunately, lately people in the different regions have become more isolated from one other - just when cooperation is most needed. But citizens are getting together and reaching out to encourage more cooperation.

The Peace & Play team is part of this effort. Its members are from all over their world. They met to think about how they could best contribute. One idea was to build on their experience with inclusive local programs for children and create a space where children from all regions could meet and interact from an early age.

After consulting with groups of parents and children involved in their programs, Play & Peace decided to go ahead with this as a pilot project. They hope it will help strengthen global peace and cooperation. We meet them as they start discussing their vision for this play space.

Two members of their project team, Prami and Kroja, have some solid experience with RBM.



Spino is a child development expert.

Margella is a Peace & Play volunteer who has helped with their programs in her city.



Tiira is a community member from another region who wants to get involved.

Narva is a child who is participating in project planning, with a group of other children, in order to include their perspectives in the project.



Throughout this course, we will follow the progress of this Peace & Play project team as they teleport to meetings on the 5 different islands of their world to discuss their new project.

Quest 1: Planning Strategically & Taking a Participatory Approach

Peace & Play: Setting the Vision

Prami Since we're all here, let's start! Today, we're moving forward with our new play space project. We've talked with kids, community members in different regions and experts. There seems to be a lot of support.

The kids I know believe they can make a big contribution to peace and cooperation. But it's important to make sure this play space feels like it belongs to everyone. **Narva**

Prami The idea is to build it in the clouds – a place everyone shares – and have children teleport to it. Do you think that would work?

Narva Yes! And kids would be excited about going to a play space in the clouds.

Great! To give our project the best chance of success, we are going to apply a results-based management approach, or RBM. **Prami**

Spino Have you used RBM for other projects?

Prami Yes, Peace & Play always uses this approach – and Kroja has lots of experience. I know it's new for you, and we're here to provide guidance.

Using RBM will help make sure we all have the same understanding of the results we want to achieve with this project, why they are important and how we're going to achieve them. **Kroja**

Tiira I'm on board!

Kroja I'll be helping the team develop sound RBM tools to support project management and monitoring.

What kind of tools? **Narva**

Kroja Well, one is called the "logic model" – it's like a path to our success. Another is called PMF, short for "performance measurement framework" – it's a kind of guide to track our progress.

Narva Why do we need tools other than hammers and drills?

Ah ah, yes, we'll need them, too! RBM tools are useful for getting better results and helping us learn and adjust what we are doing along the way if we need to. **Kroja**

Prami Using RBM tools will also make it easier for us to share our results with others!

Kroja Let's start!

Our first step is to develop our "theory of change." In other words, what change are we working towards, and how do we expect it to occur? **Prami**

Narva We want to get to know different kids from all different parts of the world – and have fun with them!

Margella I guess it's something to do with peace and cooperation.

So that we learn to get along when we grow up and not fight with each other! We want all the adults in the whole world to be nice to each other and work together, and we want to solve all the problems forever and ever! **Narva**

Prami That's right, that's the big picture. That's why we want to create this play space. Now we need to think about how we expect our project to contribute to this long-term vision of peace and cooperation in our world.

Kroja Before we get into the details of our project, we need to make sure we understand how and why we expect the activities we plan to produce the results we want.

I think I'm with you. We start by identifying the problem we want to solve and analyzing its cause, so that we can see how our project could address it? **Tiira**

Kroja Yes, exactly. Narva, how would you describe the problem we want to help solve?

Narva The adults fight a lot, and I can't teleport myself to play with friends in different places because it's not safe anymore.

Yes. We haven't got much cooperation between different groups and regions in our world. There is more and more tension and conflict. It wasn't like that before. **Margella**

Spino I agree. We know that one of the main causes of this problem is that people don't know or understand others who are different from themselves.

Kroja And how can we address this? Our project can't do everything, but we do have evidence that children who have a chance to interact with other children who are different from themselves at an early age can learn to appreciate others more and behave more cooperatively. That's something our project can work on.

Prami Well, my friends, I think we have it! Let's sum up the theory of change we've agreed on: We believe that *if* children have the opportunity to get to know a diversity of others in an empowering and play-centred environment, *and* they are supported to strengthen their skills in cooperative problem solving, *and if* the environment is equitable and inclusive with respect to gender and other forms of diversity, *then* children will gain greater appreciation for diversity and a sense of connection with people living in different places.

We *assume* that parents and other community members will allow children to access the opportunities our project offers. **Kroja**

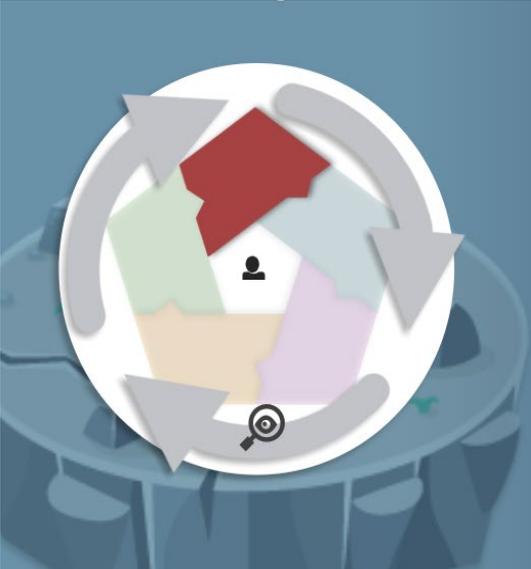
We also *assume* that children will share the positive outcomes of their Peace & Play experiences with parents and others in their communities, and that they will carry their increased sense of togetherness into adulthood, contributing to stronger peace and cooperation globally – which is our "big picture" vision. **Tiira**

THE END





Quest Objectives



“Setting the Vision” means:

- Focusing on the big picture of what you want to achieve
- Deciding on your strategy and priorities

This quest will show you:

- The importance of involving the right people in this process
- How to plan strategically, with your expected results in mind

You will also learn how to integrate gender equality and other cross-cutting themes right from the start.





Creating a Shared Vision Starts with Involving Stakeholders



RBM: a PARTICIPATORY and INCLUSIVE approach

Defining a theory of change and developing result statements and logic models - and other RBM processes - should be done in a **participatory** and **inclusive** fashion.

This allows the **project design and management** to **benefit from** the **different** and **important perspectives** and **knowledge** held by a range of stakeholders, such as community members, donors, other partner organizations, project managers, and subject matter experts... Including everyone from the outset ensures that everyone starts on the same page!

An inclusive process helps build **ownership** and **commitment**. It also helps ensure the intervention is **relevant** and **feasible**. Involving the right people is useful both at the beginning of a project and throughout the project.

The Theory of Change

You saw how Peace & Play discussed their project in its early stage. They were developing their theory of change, that is, the change pathway they intend to follow with their intervention to produce the results they want. They considered how this pathway is affected by different aspects of the context they are working in.

A theory of change is a **representation** of *why* and *how* an initiative is expected to lead to the desired results. Your theory of change is complete when you are able to explain *why* and *how* you expect your project to **generate results** that will in turn **create** or **contribute to the desired change**.

A theory of change describes your understanding of the overall strategic **framework** of your intervention. It is the “big picture.”

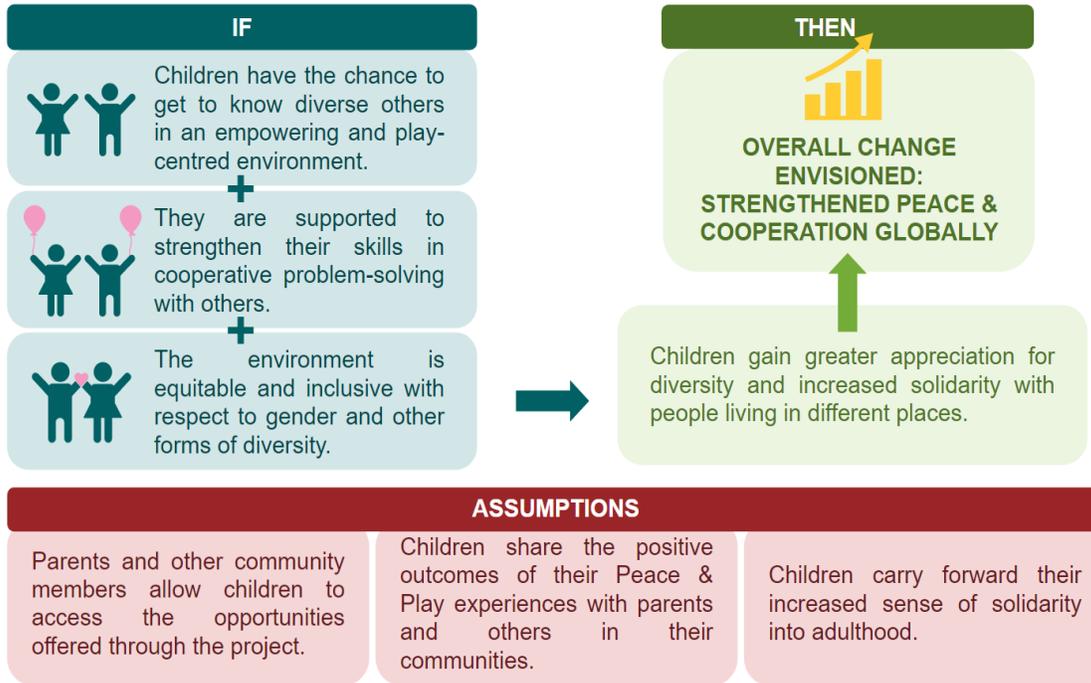
When you are developing your theory of change, you need to think about the **assumptions** that underpin your program choices. You also need to think about **risks** that could threaten the success of your program.

You can express a theory of change visually in various ways, or even just in writing, as long as it makes the pathway of change clear.

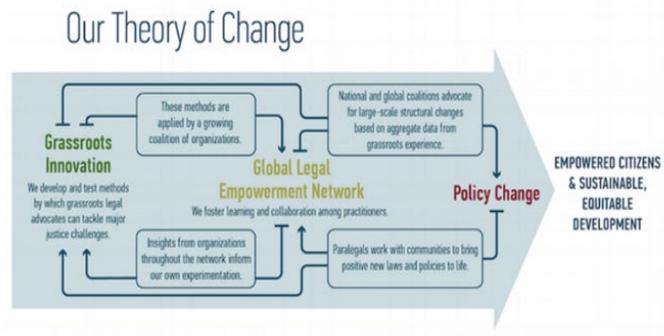




A theory of change could also just be a paragraph of text.



Below are 2 graphic examples, with text, text in boxes, arrows and links between the different elements. We selected these to show you how different their visual representations can be. There is no right or wrong way to do it.



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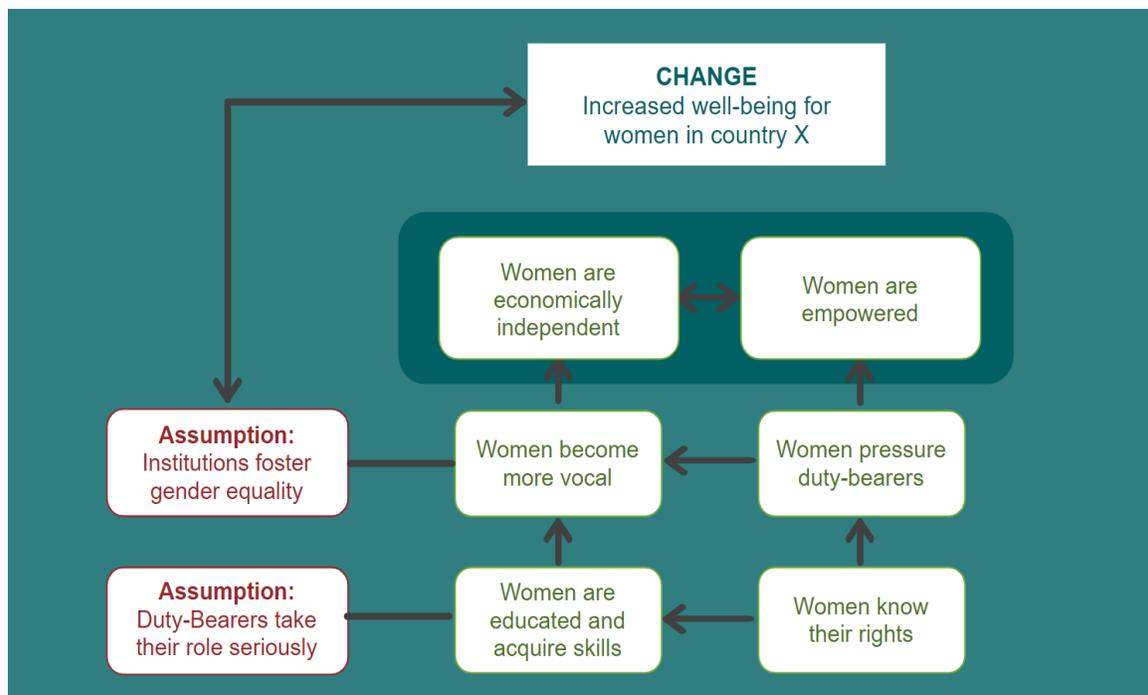
Consider this example:

- The desired change is to increase the well-being of women in country X.
- To achieve this, the team believes that women need to become **economically independent** and **empowered**.
- They assume that to encourage the economic independence of women, **institutions should foster gender equality** - for example, governments should have quotas for women's participation & representation, there should be laws and regulations in place to protect women's property rights; schools and workplaces should promote gender equality in education and skills development, and so on.
- The team also assumes that to encourage women's empowerment, **duty-bearers should take their role seriously**.

Note that these assumptions are not necessarily controlled by the project, but the team recognizes that they are important to achieve the changes they want.

- To have economically independent and empowered women, the team also believes that women need to become more **vocal**.
- For this to happen, they believe that women need to be educated and acquire certain **skills** - such as financial literacy and business management, and public speaking and advocacy. This will help women become effective advocates for their own interests and rights.

The project itself does not try to contribute to all these areas. Instead it's focused specifically on financial literacy and business management skills. However, keeping in mind the emphasis on rights and empowerment in the project's theory of change, project implementation will be sure to provide opportunities for women to gain confidence and become aware of their rights through participating in project activities.



Summary and Notes

The Peace & Play team have made good progress with finalizing their theory of change. What about your project?

In this quest, you saw that:

- Once the idea of a project has been analyzed and validated as potentially able to bring about sustainable change, planning for it is very important.
- The participation of all the stakeholders is required in creating a theory of change: the why and how this project will happen.
- A theory of change can take many forms, as long as it contains the framework for an intervention: What pathway do you intend to follow to reach the desired results? What are your assumptions?



Quest 2: Organizing the Desired Results into a Logic Model

Peace & Play: Focus on the Results

 We did a great job of thinking through our theory of change for the play space pilot project. Now it's time to go more into the detail.

 Yes, we need to think about exactly what our project is going to do and write these components up as expected project results and outputs.

 Whaaaaat? You lost me a bit there... You want to write down what we are going to do?

 Not yet. I know it's tempting to skip to the activities, but we need to start at the other end – with the **results** we are hoping to achieve.

 Give us an example.

 Remember, we want our play space to contribute toward strengthening peace and cooperation among all our citizens, right?

 Yes!

 That's the big picture of *why* we want to do this project. But what, exactly, is the result that we expect from our project?

 For example, could it be an increased sense of connection among children from different places around the world?

 Yes, that could be the high-level impact we want our project to achieve. I'll write it here at the top.

 Then we need to think about how to achieve that impact. Maybe in order to feel more connected with one another, children from different places need more opportunities to get together. That is an *outcome* our project could achieve.

 Maybe they also need to learn how to work on problem-solving together. Is that something we can achieve with our project?

 I see... So we need to talk about the highest-level result our project is aiming for...

 Yes, we call that the **impact**.

 And then we need to think about *how* to get that result.

 Yes, that's the next level down – we call these the **outcomes**. They are like sub-goals for the big impact we want to achieve...

 And below the outcomes, we have the **outputs**. Outputs are the products or services that come from doing the activities we organize.

 So, we need to define the activities, then?

 Not yet. Of course, we have them in mind, but first, we focus on *why* we are doing the activities – what we want them to produce.

 What outputs do we need in order to get the outcomes we're expecting? For example, we said that an outcome we want is increased interaction between diverse children from different regions. An output that could contribute to that outcome would be having the play space designed and built.

 OK. So once we're clear on our outcomes and outputs, the activities we need to determine will be more obvious.

 Yes. Above all, we always ask ourselves, *why* are we doing this?

 How will we make sure that the play space feels welcoming for kids of different genders?

 How do we include kids from everywhere on our planet, with all their different languages, backgrounds and abilities?

 How will my friends who live far away from a teleportation station come to the play space?

 You are right – we need to ask ourselves these questions and make sure the answers are reflected in the results we define and the logic model we build out of them.

 Logic model?

 Yes – a graphical representation of our impact, outcomes, outputs and activities. I'll show you in a minute.

 We also need to think about **risks** and **assumptions** related to our expected results. Eventually we'll need to systematically assess these risks and think about mitigation strategies – but we'll learn about that another time!

 That's a lot to get done!

 It sounds like a lot, but we will save so much time, and later you'll look back and be glad we spent this time together developing our logic model!

THE END





Quest Objectives



Result statements are combined in a logic model, a key tool in the RBM toolbox and the backbone of the performance measurement framework (PMF).

This quest will show you:

- How to build a simple logic model





What are Results?

Let's look in more detail at the results we are talking about in "results-based management."

Definition:

You already know that results are observable, describable changes that can be measured. They are changes that can be attributed to an identified cause-and-effect relationship - that is, we know why the change happened.

In RBM, result statements express what a program or project is supposed to accomplish or what it contributes to.

Results can relate to changes of many different kinds, such as changes in:

- State
- Situation
- Behaviour
- Attitude
- Function
- Capacity
- Practice

Of course, we expect our projects or programs to lead to positive social change. In RBM, we express these expected positive changes in result statements.

But it's important to note that changes can be negative or unexpected, as well.

Describe the type and direction:

The way we express project or program results is by describing the type and "direction" of the desired change. We write the statements so they start with one of the six words listed here.

- Enhanced
- Increased
- Improved
- Strengthened
- Decreased
- Reduced

Read the following examples :

Enhanced knowledge of gender equality concepts and practices for men, women and non-binary people working in human rights organizations

Increased integration of minority or vulnerable communities in the development and implementation of fire management planning

Increased number of children attending school full time in the three participating communities

Improved capacity of residents to practice sustainable forest and biodiversity conservation

Improved coordination among government, community, and private-sector stakeholders for fire management

Improved levels of academic performance in Jamaica

Strengthened procedures in district police stations for responding to gender-based violence

Strengthened citizen commitment to lifelong learning

Decreased prevalence of malaria in girls, boys and non-binary children under 5 years of age in X district

Reduced threats to biodiversity in targeted forest landscapes

Reduced vulnerability of local communities to climate change

Reduced violence in schools in the project area





A participatory, inclusive approach:

Of course, result statements should be developed in a participatory, inclusive fashion to make sure that different project stakeholders agree about what an intervention is trying to achieve.

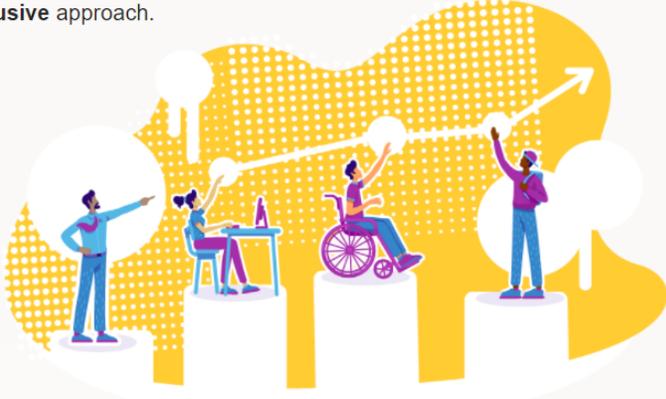
This participatory approach will help lead to a clear agreed-upon formulation of the expected results all will be working towards.

Who you involve, and how you involve them, will depend on your project and context. For example, you might hold a workshop with all team members and community members, representatives of partners, or others in developing result statements and other RBM elements. Or you might consult with community members separately. At the beginning of your process, you should ask: “Who should be involved in developing our result statements and RBM tools? What type of activities should we use to engage them in the process?”

What are Results?



Result statements should be developed using a **participatory, inclusive** approach.



- 1**
DEFINITION
- 2**
DESCRIBE THE TYPE
AND DIRECTION
- 3**
A PARTICIPATORY,
INCLUSIVE APPROACH





Results are SMART



Specific

The statement must include :

- **What** we are trying to change,
- **Who** it will benefit,
- **Where** we expect the change to take place

Relevant

The statement must reflect the actual needs of beneficiaries or stakeholders and the realities of the project context

Measurable

The statement must be definable in the sense that it can be measured by indicators defined at the next step, but it shouldn't include a target. The target is also defined at a later step.

Achievable

We must be able to attain the results with(in) the available resources and time allotted

Time-Bound

The result must be achievable during the life of the project





A good result statement is SMART! That is: specific, measurable, achievable, relevant and time-bound.

When writing a result statement, we describe clearly **who** is affected by the result, and we are as **specific** as possible about what it means.

Of course, it must be **relevant** in the context.

Even though we don't define indicators for result statements until later on in the process, we keep in mind that they must be **measurable**.

They must also be **achievable during the life of the project**.

For example, the statement "Increased awareness of the importance of vaccination" is too vague: we don't know who is affected by the result, and we don't know what those results would be, specifically. A better statement would be, "Increased awareness by parents of children under 5 in the Kagadi district of the importance of vaccinating their children."

Another strong result statement could be, "Increased rate of vaccination for children under 5 in the Kagadi district."

Remember, a result can be a change in knowledge, attitude, or capacity and not just behaviour, practice, or state.

Result statements should be kept **short, precise, and related to one idea**.

Avoid using words or phrases such as "through," "by," or "leading to," because these point to implementation strategies. The result statement should describe *one* change that we are expecting. It should not explain *how* the change will be produced.

In sum, result statements:

- Are worded as simply as possible
- Are as precise as possible
- Contain only one idea
- Start with one of these six words: increased, decreased, improved, enhanced, reduced, strengthened
- Describe who is affected by the change and where
- Do not include targets





Exercises: Are These Results Statements SMART?

Exercise Answer Sheet:

Development of high-quality protected-area ecotourism in the Democratic Republic of Congo

WEAK STRONG

This result statement is weak because:

- It describes an activity, not a change.
- It does not identify a type or direction of change.
- "High-quality" is not precise enough (what is meant by high-quality?).
- It lacks detail, such as who is involved and where exactly.

Better version: Improved ecological protection systems in tourism areas in Zones 1 and 2 of the Congo Basin

Increased resilience of households, communities, and businesses in the Congo Basin in terms of the negative effects of climate change

WEAK STRONG

This result statement is strong because:

- It describes the direction/ type of change.
- It focuses on one change (resilience).
- It contains appropriate detail regarding who is involved and where they are located.
- It will be measurable with indicators.

Organize three national meetings and one regional meeting on conservation policy, including gender aspects, by November 2018

WEAK STRONG

This result statement is weak because:

- It describes an activity, not a result.
- It includes targets (numbers and a timeframe).

Better version: Enhanced attention to conservation policy issues, including gender aspects, by policymakers at the national and regional levels

A 20% increase in the number of children attending school full time by the second quarter of the year, through an awareness campaign

WEAK STRONG

This result statement is weak because:

- It does not identify the "where."
- It contains a target (number and timeframe).
- It includes the "how" and the bridge word "through."

Better version: Increased number of children attending school full time in X district

Improved procedures in district police stations for responding to gender-based violence

WEAK STRONG

This result statement is strong because:

- It focuses on one change (improved procedures).
- It has appropriate detail regarding who is involved and where they are located.
- It will be measurable with indicators.

Increased safety for human rights defenders by creating protection networks

WEAK STRONG

This result statement is weak because:

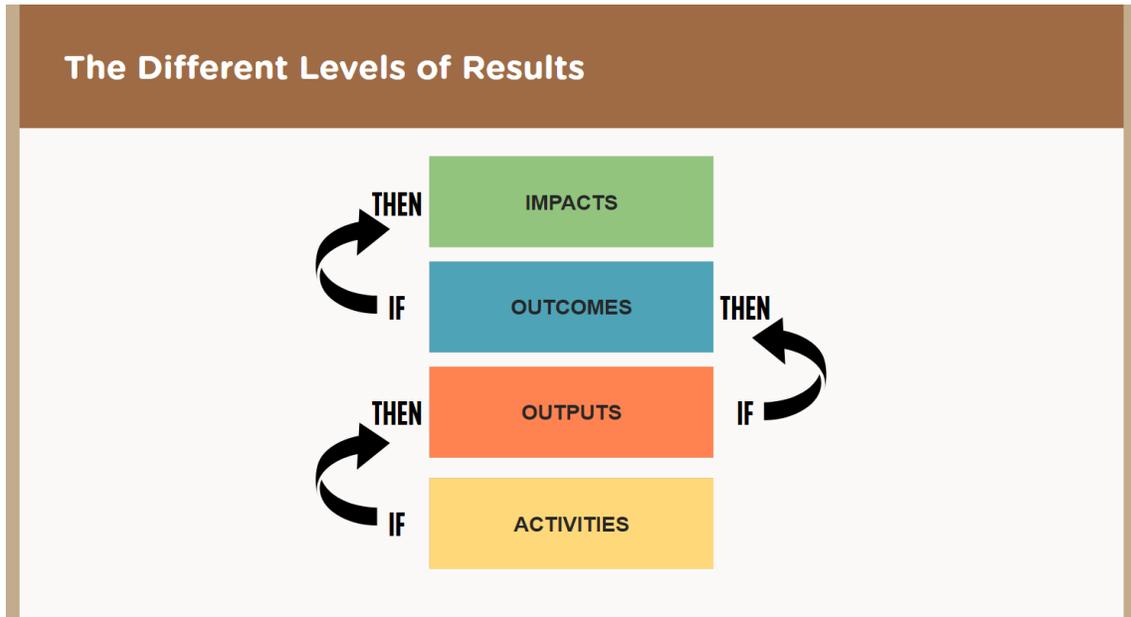
- It includes the "how" and the bridge word "by."
- It does not state the "where."

Better version: Strengthened protection networks to respond to threats to the safety of human rights defenders in Colombia





Impact, Outcomes and Outputs



Change is an evolving process. In RBM, different levels of results seek to capture changes that occur at different points in time and are linked to each other through cause-and-effect relationships.

The main levels of results that we identify in RBM are impacts, outcomes, and outputs. The activities we carry out produce outputs, the outputs lead to changes at the outcome level, and outcome-level changes contribute to impacts.



Note that different words are used to denote these different levels.

You can find a list of the equivalents in the resources.

Impacts:

IMPACTS are the high-level, longer-term changes that an intervention works toward.

An impact statement expresses the long-term desired result produced by a development intervention. It defines the overall “big picture” need or problem being addressed - the justification or the “why” of the project, program, or intervention. It is the larger change or goal that is expected or hoped to occur, the ultimate sustainable change.

The impact usually implies a sustainable change in condition or state. These are long-term effects on identifiable population groups, communities, systems or organizations. These effects can *be* economic, socio-cultural, institutional, environmental, technological or of other types and often have some relationship to internationally agreed-upon and national development goals.

Many factors and stakeholders may influence change at this level, so your project may contribute to rather than directly produce this overall long-term goal. Monitoring of results at the impact level normally extends beyond the ‘life’ of the project or program itself.





Outcomes:

At the next level of results, contributing to IMPACT, are OUTCOMES.

Outcomes are defined as the intended short-term and medium-term effects of an intervention.

Outcomes are changes that occur when beneficiaries or stakeholders make use of the products and services delivered by the intervention. They are the changes required for impact-level results to occur. Outcomes can include improvements in capacity and performance by primary duty-bearers (such as governments). They may include changes in behaviours and attitudes, social action, policy formulation, decision-making, norms and knowledge, standards, etc.

Outputs:

The next level of results, below the outcomes, are OUTPUTS.

Outputs are the immediate results of a completed activity or set of project or program activities.

Outputs are new products, goods, and services - or sometimes changes in skills and capabilities of individuals or institutions - that result from the completion of project activities.

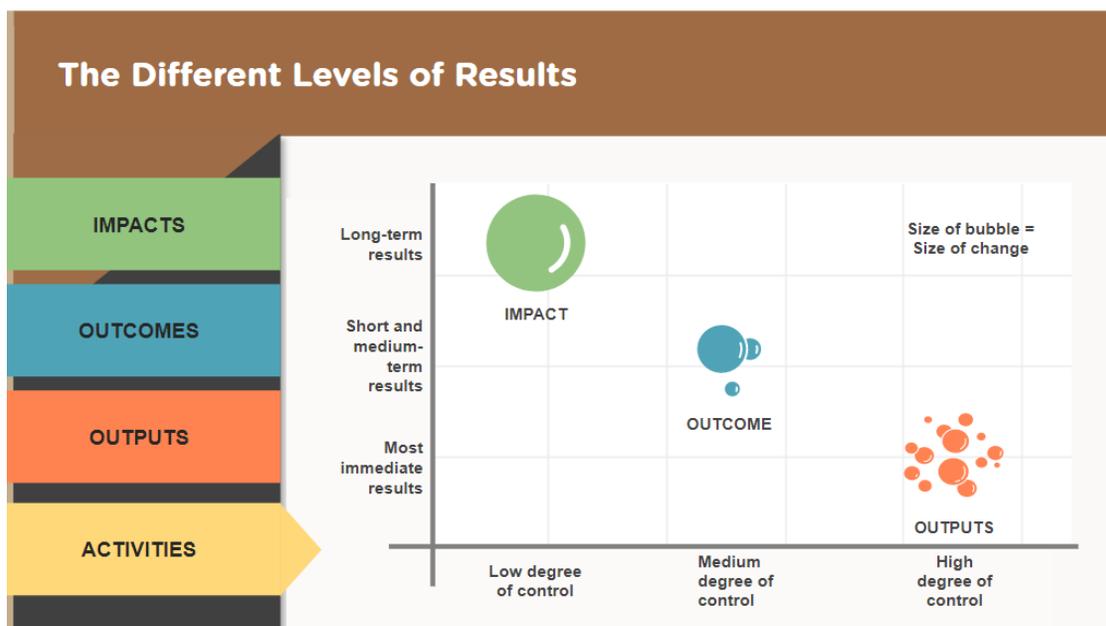
They are the most immediate effects or deliverables from the activities implemented within a development intervention. Generally, they are fairly tangible.

They are achieved with the project resources provided and within the period specified. Outputs contribute to outcomes. For example, outputs like an evaluation, a report, a new system, or changes in skills and capabilities lead to higher-level changes such as policy formulation, decision-making and changes in general behaviours and attitudes (outcomes).

In brief:

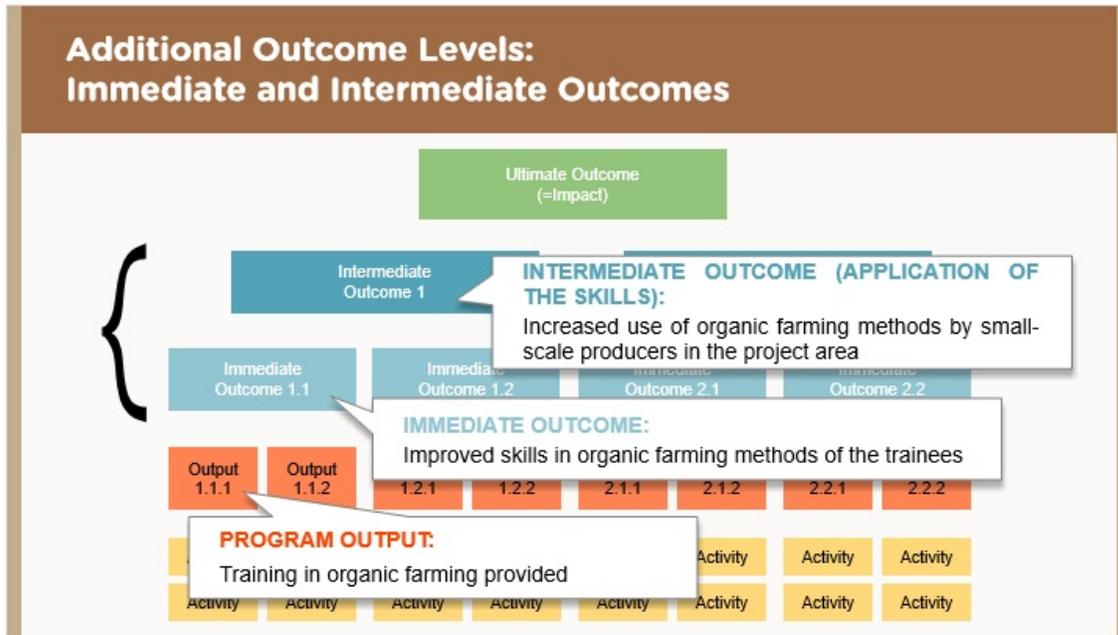
As we move from outputs to outcomes to impact, our degree of control over the results usually decreases, the significance or scope of the change increases, and the timeframe in which you will witness the result also increases. In this way, the longer-term results (impact) have the greatest effect, and therefore there is the lowest degree of control over these, while the more immediate results (outputs) constitute the lowest level of change, and hence the degree of control over these is the highest.

Impact, outcomes, outputs, and the activities that feed into them are organized into what is called a logic model. The logic model visually illustrates the cause-and-effect relationships between these different levels.





Additional Outcome Levels: Immediate and Intermediate Outcomes



Some logic models add an extra level of results, distinguishing between **intermediate** and **immediate** outcomes.

This additional level of results at the outcome level can be extremely useful. It can help to capture the logical pathway from changes in areas such as **capacity, knowledge, attitudes, awareness** - which occur as a more or less **direct result of program outputs** - and **changes** in areas such as **behaviour** and **practice** that result from these.

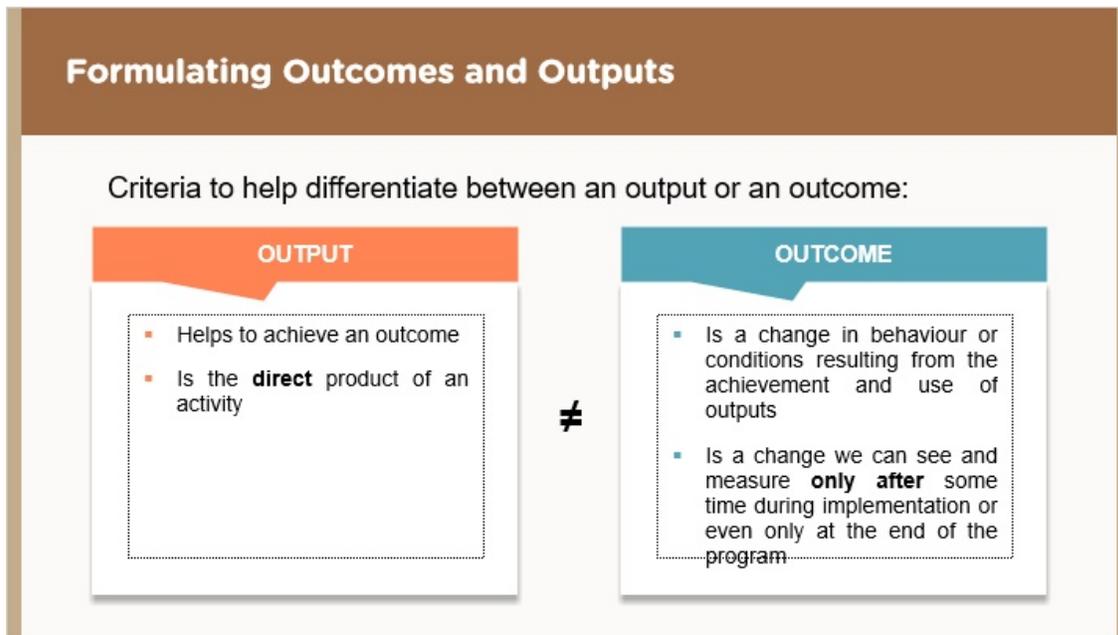
For example, in an agriculture project an SMO has the output “training in organic farming provided.” The immediate outcome of the training might be “improved skills in organic farming methods” of the trainees.

The **intermediate outcome** is the **application of the skills** - for example, “increased use of organic farming methods by small-scale producers in the project area.”





Formulating Outcomes & Outputs



A good way to differentiate between an outcome and an output is to remember that an output is produced *directly* and *immediately* from an activity or set of activities. That means you can monitor whether planned outputs are being produced as you go along, without having to wait and find out whether the outcomes they contribute to are achieved or not.

These criteria can help to clarify whether you are looking at an output or an outcome.

Defining Results with Gender-Equality in Mind

Gender equality and inclusion - like other cross-cutting issues - should be considered at every stage of the RBM project cycle. This means thinking about the different roles, needs, priorities, and circumstances of people with diverse identities: women, men, and non-binary people, racialized people, and people of different ages, socioeconomic classes, ethnicities, religions, sexual identities, national origins, migrant status, abilities, and more. You need to ensure that the results you define - and eventually your indicators, data collection methods, and other aspects of project implementation and monitoring - reflect these differentiated realities.

Gender Analysis and Intersectionality:

Systematic thinking, based on reliable evidence, about how gendered norms and practices affect things like access to and control over resources, opportunities, constraints, and power is called **gender analysis**. Such analysis should take an intersectional approach that considers how people are affected by discrimination linked to a number of overlapping social identities. For example, an individual may face barriers because of their gender, but also because of their religious identity or socioeconomic status. Such intersections can produce compounded discrimination, and variations of experience within categories.

Resist the tendency to consider gender equality simply in terms of the proportion of women participating in project activities.





When addressing gender equality and inclusion, "do no harm" is the first principle. You must identify and mitigate any potential risks to project participants. In many contexts, advocating for gender equality can put people at risk. It can also be unsafe or uncomfortable for people to be identified as LGBTQIA2S, even if your project seeks to foster a safe and supportive environment for self-identification.

Defining Results with Gender-Equality in Mind

- 1**
GENDER ANALYSIS AND INTERSECTIONALITY
- 2**
POWER, GENDER, AND DIVERSITY DYNAMICS
- 3**
EXAMPLES OF RESULT STATEMENTS

Consider issues such as:

- The social roles of people with diverse and intersecting identities
- Discriminatory social norms and stereotypes
- Differences in people's access to resources and benefits
- Differences in people's access to and influence over decision-making
- The different ways diverse people and groups are treated by laws, policies, and institutions
- Differing needs, priorities, and circumstances of different groups and individuals
- Any potential gender equality risks, remembering that "do no harm" is the first principle

Power, Gender, and Diversity Dynamics:

Gender analysis should lead to thinking about dynamics related to gender and other roles and responsibilities, control of assets and resources, access to decision-making spaces, and more. You need to ask yourself how project interventions respond to these factors. This goes beyond the level of participation by women or other targeted groups.

When defining project results, you should always consider how they reflect what you learned from gender analysis. Don't assume gender equality will be addressed automatically: if gender and other cross-cutting issues are important, they should be visible in the logic model so that they are not overlooked during implementation and monitoring.

There are different ways of defining the approach to gender in a project or program. A continuum of gender approaches, which may overlap in practice, can be defined as:

- **Gender blind:** ignores the impact of social gender roles (and therefore often reinforces them)
- **Gender accommodating:** works around existing gender norms
- **Gender sensitive:** ensures equal participation and seeks to use processes that do not exacerbate inequalities
- **Gender responsive:** addresses gender differences in needs, impacts, and access
- **Gender transformative:** seeks to change gender norms and practices at the root of inequality

A participatory approach to project development that includes men, women, and non-binary people from diverse categories or groups can help you capture important information and perspectives to ensure the intervention works for all stakeholders.





Examples of Results Statements:

Here are some examples of result statements with and without gender aspects included.

Example 1:

IMPACT:

Without gender equality (GE): Strengthened influence of young people in municipal decision-making processes in the project area.

With GE: Strengthened influence of diverse young people, **especially girls, young women and LGBTQIA2S people**, in municipal decision-making processes in the project area.

Example 2:

OUTCOME:

Without GE: Enhanced efforts by local governments to create and institutionalize opportunities for youth voices to be heard in decision-making.

With GE: Enhanced efforts by local governments to create and institutionalize **gender-sensitive** opportunities for **diverse** youth voices to be heard in decision-making.

Example 3:

OUTCOME:

Without GE: Enhanced secondary-student employment skills programs in peri-urban areas of Rio de Janeiro.

With GE: Enhanced employment skills programs for secondary-school students in peri-urban areas of Rio de Janeiro, **with a special focus on young men at risk of violence**.

Example 4:

IMPACT:

Without GE: Improved livelihoods for member households of participating agroforestry cooperatives in the municipality of Santa Adilia.

With GE: Improved sustainable livelihoods **for low-income women, men, and non-binary people** affiliated with participating agroforestry cooperatives in the municipality of Santa Adilia.

Example 5:

OUTCOME:

Without GE: Increased profitability of agroforestry cooperatives' productive activities.

With GE: Increased sustainable profitability of productive activities of agroforestry cooperatives, **including greater access to and control over resources and benefits for women**.

Example 6:

OUTCOME:

Without GE: Enhanced business management capacity on the part of the agroforestry cooperatives.

With GE: Enhanced **gender-sensitive, inclusive, and environmentally sustainable** business management capacity on the part of the agroforestry cooperatives.





Exercises: Practising Identifying Impact, Outcomes, and Outputs statements

Exercise Answer Sheet

The impact is a long-term desired result, a vision of a "big picture".
 An outcome describes the short or medium-term effects of an intervention's output(s).
 An output is the result of a completed activity.

	IMPACT	OUTCOME	OUTPUT
Participatory advocacy workshops facilitated with diverse and representative groups of local youth associations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Enhanced efforts by municipal governments to create and institutionalize gender-sensitive opportunities for diverse youth voices to be heard in decision-making	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Increased local youth participation in municipal decision-making processes	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Outreach conducted by local youth representatives with municipal government officials to promote the importance of youth participation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Strengthened influence of diverse young people, especially girls, young women and LGBTQIA2S people, in municipal decision-making processes in municipalities in the project area	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
School health and hygiene promotion clubs formed and functional	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increased access to gender-sensitive, child-friendly, and disaster-resilient improved sanitation and water facilities in schools and communities in the participating communities	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Improved capacity of community members to maintain disaster-resilient and improved water and sanitation facilities	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Improved child-, gender-, and disability-friendly, disaster-resilient latrines constructed in schools	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increased equitable use of disaster-resilient improved water and sanitation facilities by people in disaster-prone communities in Ghana's Upper West Region	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
School and community groups trained in the construction of disaster-resilient facilities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Workshops conducted for diverse groups in the communities on maintenance of improved sanitation and water facilities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Gender-sensitive technical assistance provided to cooperative leaders on financial, marketing, and governance topics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increased adoption of climate-adapted production practices by agroforestry cooperatives	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Enhanced gender-sensitive and inclusive business management capacity on the part of the agroforestry cooperatives	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Gender-sensitive agricultural extension support provided on climate-adapted agroforestry practices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Improved climate-adapted sustainable livelihoods for low-income women, men, and non-binary people affiliated with participating agroforestry cooperatives in the municipality of Santa Adilia	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gender awareness workshops delivered to cooperative members and leaders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>





Their impact is:

Increased solidarity among children from all different regions

Write 2 or 3 possible **OUTCOMES**, then click on **SUBMIT** to display theirs. Note that there are many possible "correct" answers.

Below are examples of correct answers, noting that there are many possible answers:

Here are the outcomes Peace & Play wrote:

OUTCOME 1: Increased opportunities for children to meet and interact with diverse children from different regions in a gender-equitable and inclusive environment

OUTCOME 2: Enhanced capacity of children to work cooperatively on problem-solving with diverse others

To self-evaluate your answer, consider the following points:

- Do your outcomes describe the short-to-medium-term effects the project will have on the behaviour or state of the group targeted?
- Do they start with one of the six words that shows the type and direction of the desired change?
- Do they focus on one thing only?
- Does it state who is impacted and where?





Exercise 2 :

Now let's write the possible **OUTPUTS** for the Peace & Play play space project. Review their story if you need to.

To review their impact and outcomes, click here.

IMPACT & OUTCOMES

Write 2 or 3 possible **OUTPUTS**, then click **SUBMIT** to display theirs.

IMPACT	Increased solidarity among children from all different regions
OUTCOME 1	Increased opportunities for children to meet and interact with diverse children from different regions in a gender-equitable and inclusive environment
OUTCOME 2	Enhanced capacity of children to work cooperatively on problem-solving with diverse others

Below are examples of correct answers:

Here are the outputs Peace & Play wrote:

X

OUTCOME 1: Increased opportunities for children to meet and interact with diverse children from different regions in a gender-equitable and inclusive environment

OUTPUT: A play space designed, built, and operating that takes into account the varied needs of children from all regions

OUTPUT: Activities promoting non-traditional gender roles developed and facilitated with children visiting the play space

OUTCOME 2: Enhanced capacity of children to work cooperatively on problem-solving with diverse others

OUTPUT: Inclusive games designed and played by children in the play space

OUTPUT: Children trained in cooperative problem-solving techniques

To self-evaluate your answer, consider the following points:

- Does each output clearly describe an immediate result from an activity?
- Does it start with one of the six words showing the direction of the desired change?
- Does it focus on one thing only?
- Does it state who is impacted and where?





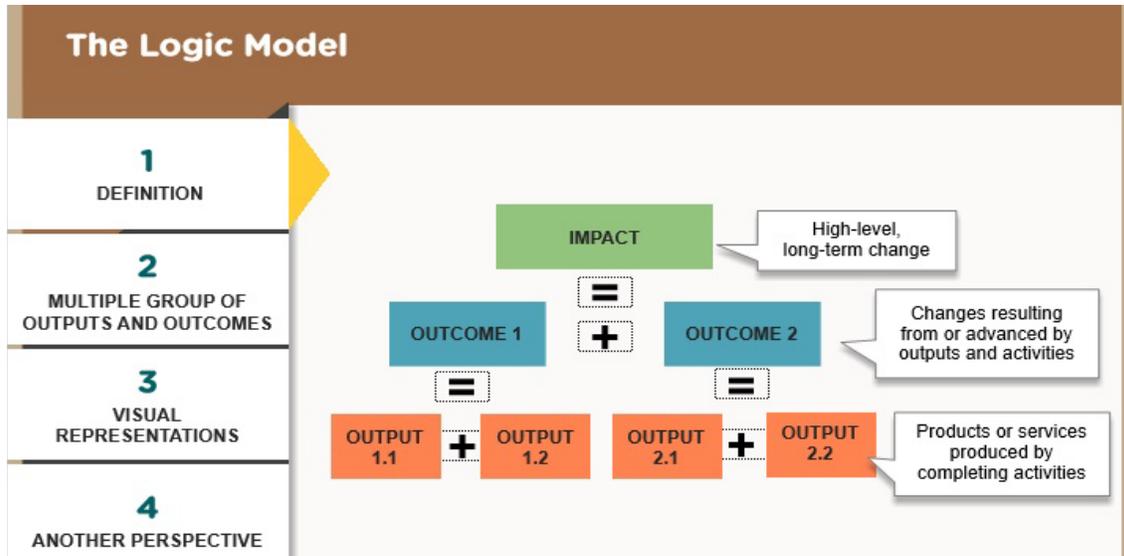
The Logic Model

Now that you understand that results are defined at different levels, you can see how the impact, outcomes, and outputs fit together to form a logic model.

Definition:

The logic model is a management tool used to facilitate the planning, execution and evaluation of a development intervention.

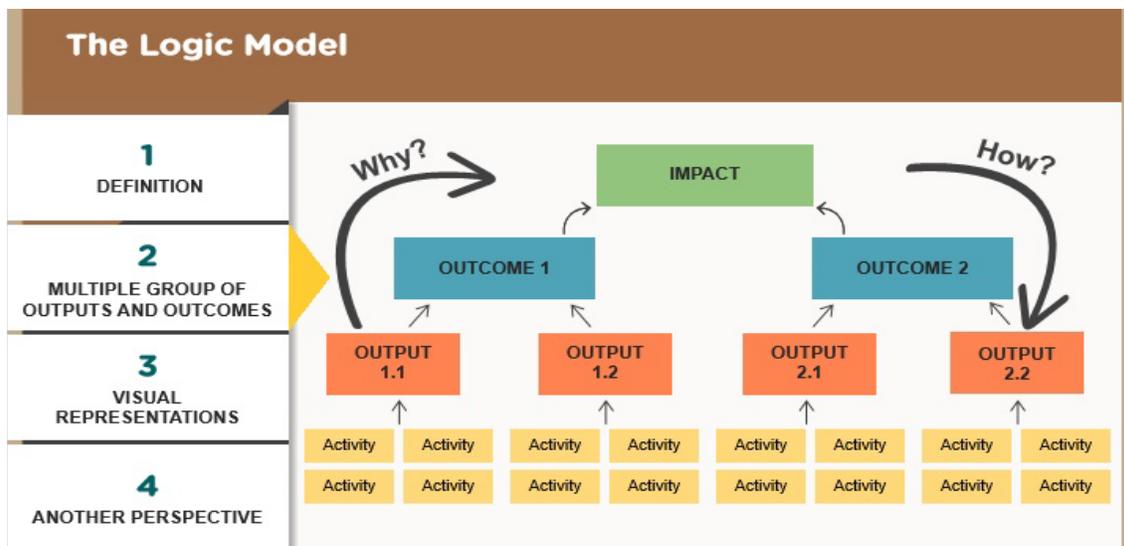
A logic model **reflects the change pathway** identified in your theory of change. It shows the **logical connections** between the different levels of results in a project.



Multiple Group of Outputs and Outcomes:

A logic model can include multiple groups of outputs and outcomes that emerge from a variety of project activities. A group of outputs may lead to the achievement of one outcome, and subsequently a group of outcomes lead to the impact, building upon each other in a pyramid fashion.

For example, in this diagram, Output 1.1 and Output 1.2 together logically lead to the achievement of Outcome 1. Then, Outcome 1 plus Outcome 2 should logically contribute to the Impact.

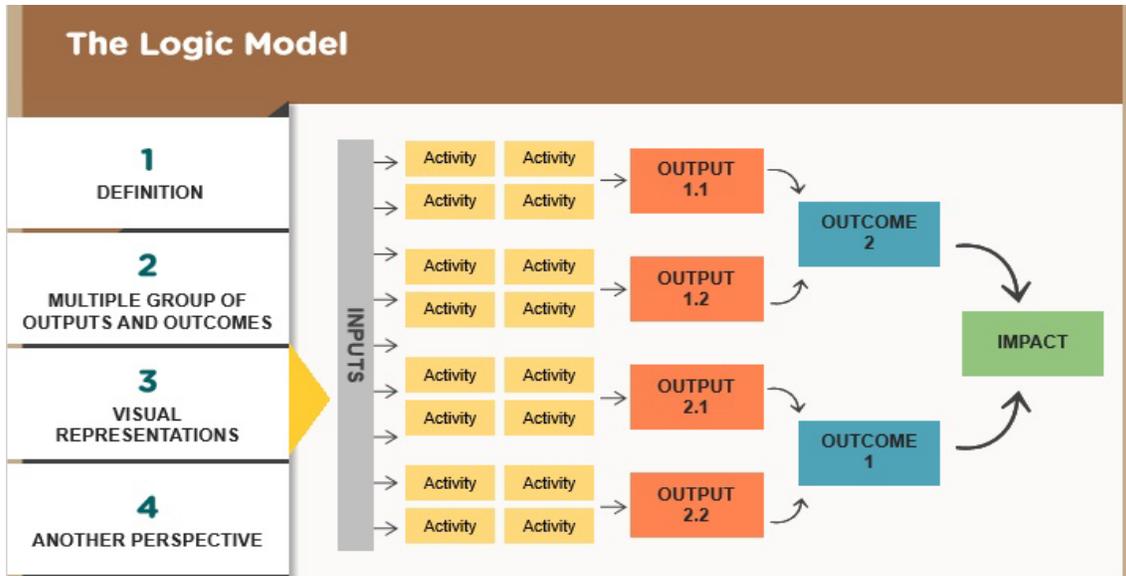




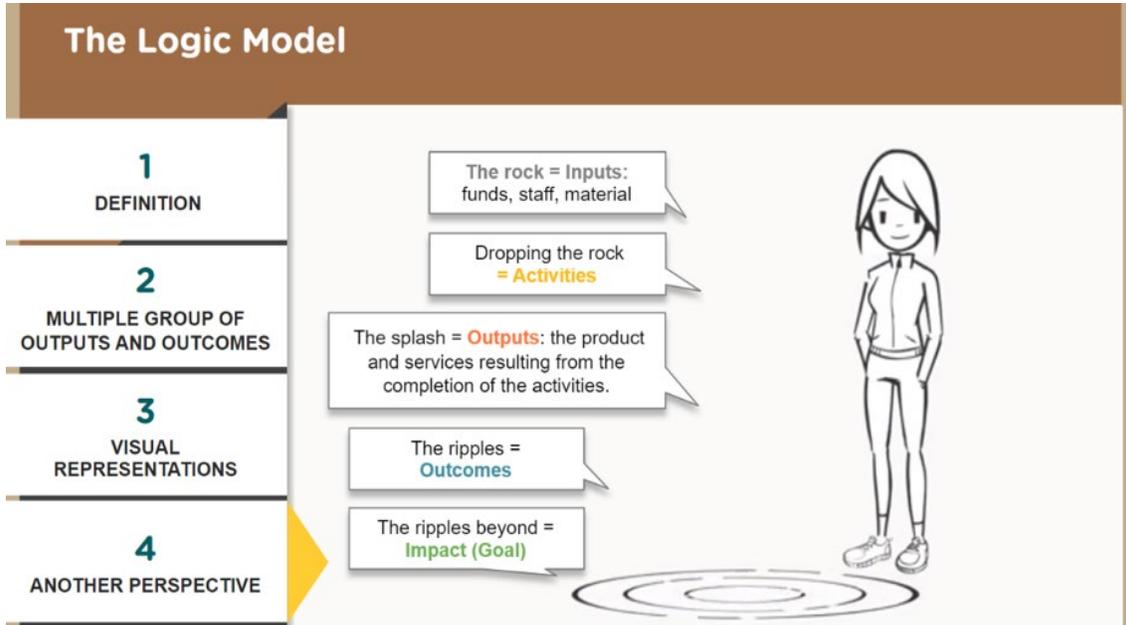
Visual Representations:

Logic models can also be represented horizontally.

At the first tier of the logic model, you'll find the activities. These activities need certain inputs for them to happen: staff, funds or resources, for example.



Another Perspective: Here's another way to think about the connections in a logic model.



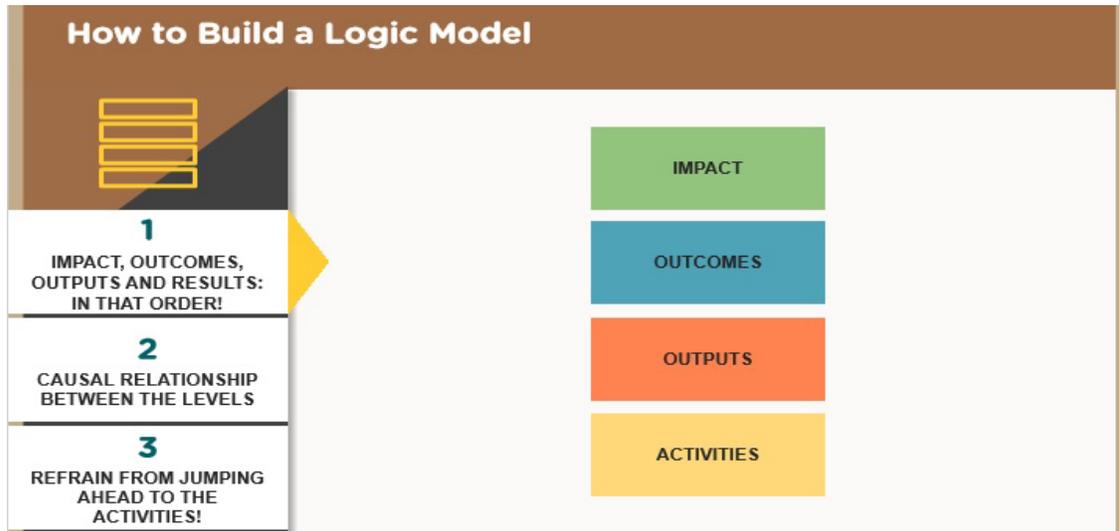


How to Build a Logic Model

Impact, Outcomes, Outputs and Results: In That Order! :

To build a logic model, start with the long-term **impact** you want your project to advance or contribute to.

Next, identify the planned project outcomes that will contribute to this impact. Then, identify the outputs that will generate these outcomes. Remember, the outputs are the products of your project activities.

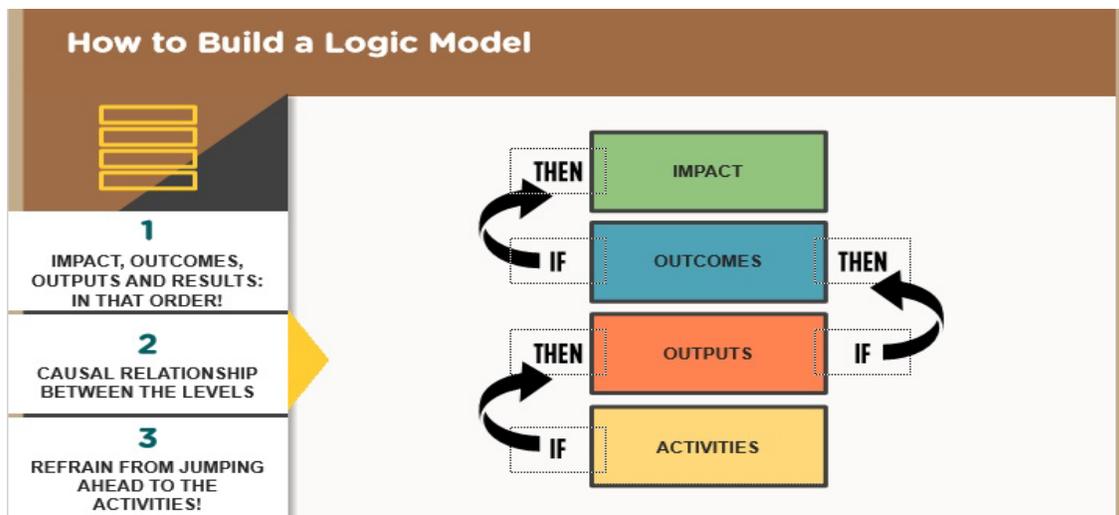


Causal Relationship Between the Levels:

When developing a logic model, you should always ask yourself whether there is a strong causal relationship between the levels. It is important to **test the logic**. A simple way to do this is to use an “**IF/THEN**” process. Starting at the activity level, ask the question: IF the following set of completed activities is completed, and IF our assumptions hold true, THEN will the identified outputs be produced? And IF these outputs are produced, THEN is it reasonable to expect progress on the outcomes? And IF these outcomes are produced, THEN will the identified impact be achieved?

Continue following this process throughout your elements all the way to the impact level. This will allow you to see where your logic is sound and where it can be improved.

You'll soon find this way of thinking routine!

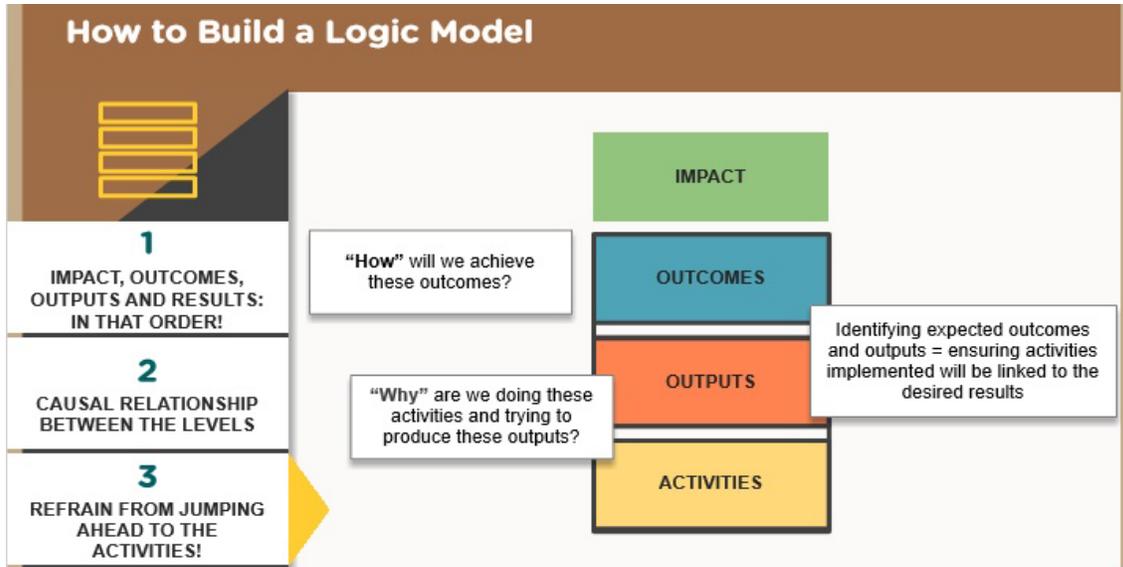




Refrain from Jumping Ahead to the Activities! :

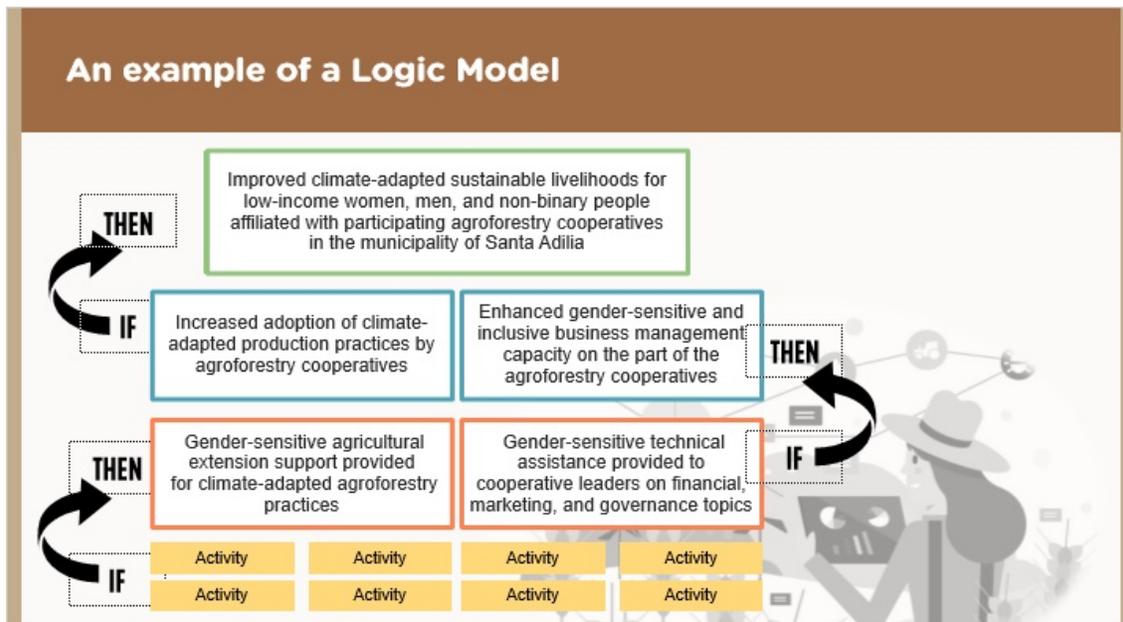
You might want to jump immediately into thinking about the activities you want to carry out because they are very tangible or about *doing* something. Taking the time to identify your expected outcomes and outputs ensures that the activities you eventually implement will be linked to the results you want to achieve.

The big question to ask as you move up the results levels is: “Why” are we doing these activities and trying to produce these outputs? As you move down the levels, the question to ask is: “How” will we achieve these outcomes? There is a constant back-and-forth between the Why and the How as we go up and down the results chain in the logic model.





An example of a Logic Model



Here is an example of a logic model for a project that works with agroforestry cooperatives.

The project team's long-term goal - that is, the desired project impact - is "Improved climate-adapted sustainable livelihoods for low-income women, men, and non-binary people affiliated with participating agroforestry cooperatives in the municipality of Santa Adilia."

IF the activities are completed, **THEN** the expected outputs are:

- That gender-sensitive agricultural extension support is provided on climate-adapted agroforestry practices
- That technical assistance is provided to cooperative leaders on financial, marketing, and governance topics

IF these outputs are produced, **THEN** the outcomes expected are:

- Increased adoption of climate-adapted production practices by agroforestry cooperatives
- Enhanced gender-sensitive and inclusive business management capacity on the part of the agroforestry cooperatives

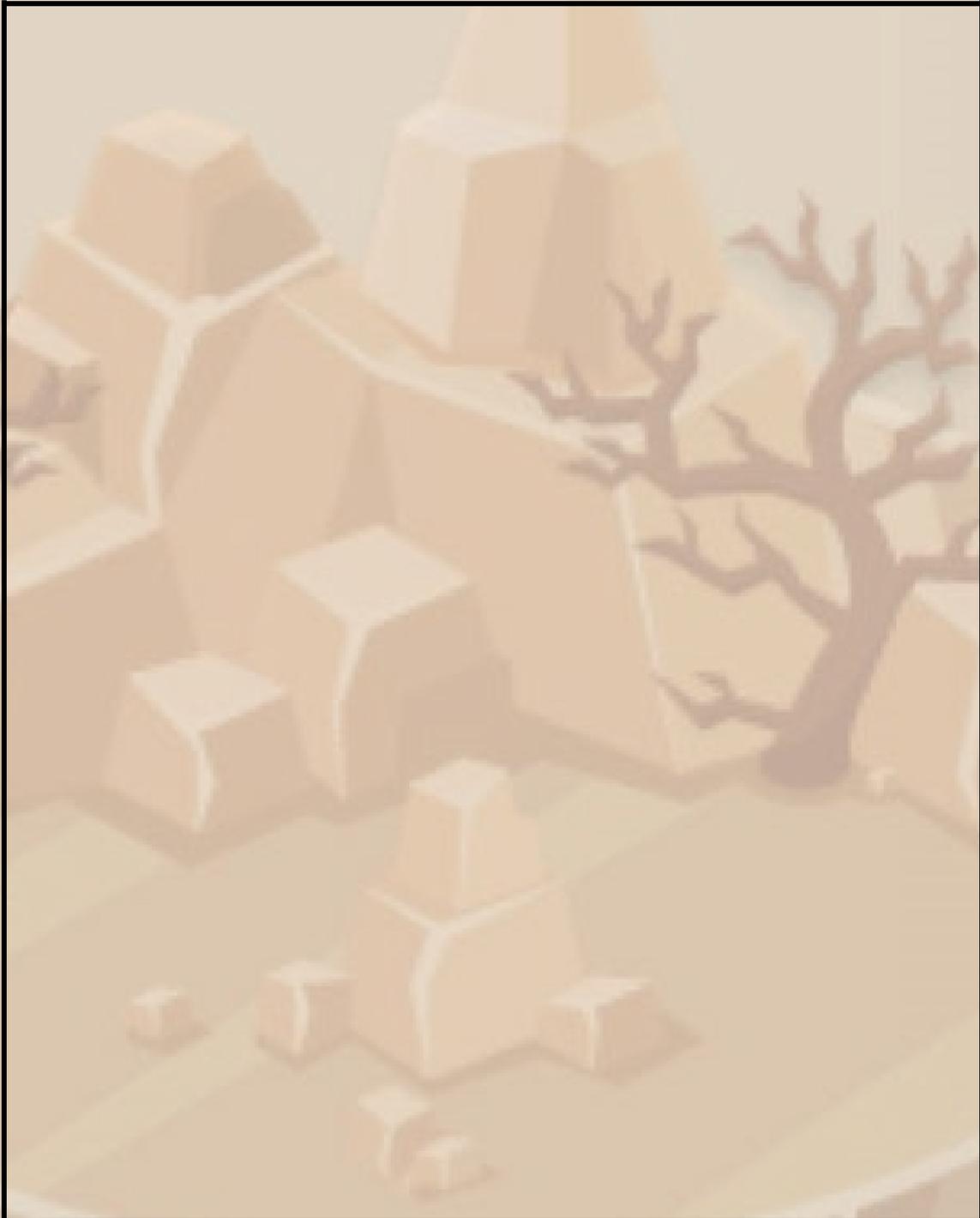


Summary and Notes

Phew! That's a big piece of work that Peace & Play accomplished in completing their logic model.

In this second quest, you also learned a lot about the logic model:

- You know what sounds/strong result statements are
- You can now distinguish between impacts, outcomes and outputs
- You know that the activities come last in the model



Quest 3: Monitoring for Results

Peace & Play: Checks In

 Well, team, time to check in. Is our play space project on track?

Prami

It was so exciting when I saw the first room with all the games!

 **Narva**

I also love the automatic translation devices!

 **Margella**

You're right – we've got some great stuff happening! Now that our project has been running for a year, let's look again at the monitoring data we've been collecting to see how things are coming along.

 **Prami**

So, we look again at the activities we've implemented, and the results they're producing?

 **Spino**

Exactly. Our goal is to always make sure we're getting the results we planned, and see if we need to adjust anything to help the project work better.

 **Kroja**

And also to make the best decisions going forward based on our data.

 **Prami**

So, Spino, how many children are participating in game design? We had a target of 300 children for each quarter.

 **Kroja**

This was for our output 2.1: Inclusive games designed and played by children in the play space.

 **Prami**

Right! Well, our indicator was disaggregated by gender, age, island of residence, and number of times each individual has participated in game design...

 **Spino**

Can you give me the overall number of participants before we go into the disaggregation?

 **Kroja**

Sure. We have 288 children involved. Almost on target!

 **Spino**

 That's good. And what about parents' and children's satisfaction with how the play space accommodates everyone's needs? That's important!

Tiira

Yes it is, Tiira! And our monitoring data shows that, so far, more than 95% are very satisfied.

 **Prami**

Wonderful. Also, the number of children who have spent time using the play space within the last six months is almost on target, although girls are overrepresented.

 **Kroja**

Could it be because the children who participated in the game design activities and promotion material were mostly girls?

 **Spino**

We'll need to think more about whether that indicator data is highlighting any problems that we need to try to fix.

 **Prami**

It's great that we've got this data to review and help us take our next steps.

 **Margella**

Yes, we may need to adjust some of our activities in order to get more boys involved.

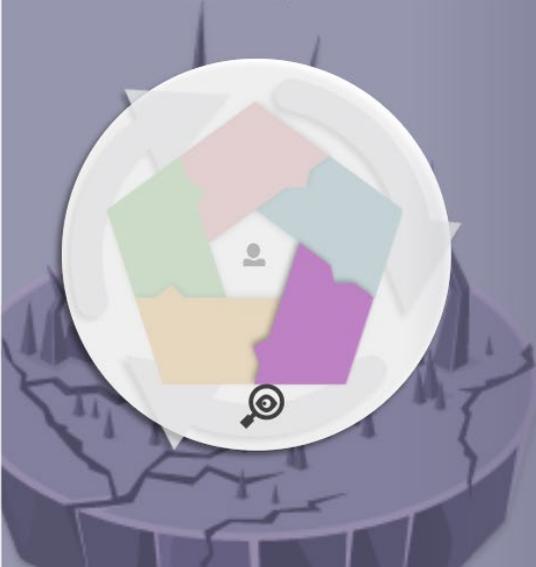
 **Kroja**

THE END





Quest Objectives



“Monitoring” means checking in regularly on the progress of the unfolding project, regarding the planned results.

This quest will show you:

- How to monitor the progress of your project using the **performance monitoring framework (PMF)**
- How to develop sound **indicators**





Differences Between Monitoring and Evaluation

In RBM, you will often hear the terms *monitoring* and *evaluation* together. Even if these words are often seen together, as if they were one and the same, monitoring and evaluation are, in fact, two distinct sets of organizational activities. They are related but not quite identical.

Monitoring Definition:

Monitoring is an **ongoing** process of collecting information to measure and assess progress. It lets you know whether you are doing what you had planned, and how well you are using resources such as time and money. Most importantly, monitoring helps you figure out what is working and what isn't. You can learn from your successes and from any problems that arise. Based on what you see while you are monitoring, you can adjust your activities and plans.

Differences Between Monitoring and Evaluation

1 MONITORING DEFINITION	 <p>Checking on progress as the project goes along.</p> <ul style="list-style-type: none"> Are we doing what we planned? How well we are using our resources? What is working? What is not working?
2 EVALUATION DEFINITION	
3 A DAILY LIFE COMPARISON	
4 M&E IN RBM: COMPARISON	

Evaluation Definition:

Evaluation is an opportunity to think deeply about the project **at a specific time** in the project cycle, such as halfway through or at the end. It helps you learn whether your project has achieved the results you expected. It also helps you understand the processes that lead to positive change and the challenges that sometimes make progress difficult. You can apply the learning from evaluation to make course corrections during your project and to help you plan future projects.

Differences Between Monitoring and Evaluation

1 MONITORING DEFINITION	 <p>Reflecting on the overall development or performance of the project. Evaluation can be done before, during and after project implementation to assess the process, outcomes, or impact.</p> <ul style="list-style-type: none"> Have we achieved the results we expected? How did change come about? What lessons have we learned?
2 EVALUATION DEFINITION	
3 A DAILY LIFE COMPARISON	
4 M&E IN RBM: COMPARISON	





A Daily Life Comparison:

In daily life :

- ✓ We *monitor* our health by weighing ourselves or checking our temperature, but we *evaluate* our overall health by going to the doctor for an annual check-up.
- ✓ We *monitor* students' progress in school by keeping track of their grades on tests and assignments, but we *evaluate* their overall achievements with annual report cards.
- ✓ We *monitor* the growth of plants in a vegetable garden, but we might *evaluate* the garden's overall success at harvest time based on the amount and quality of food grown and how it contributes to a family's well-being.

Differences Between Monitoring and Evaluation				
1	MONITORING DEFINITION	DOMAIN	MONITORING	EVALUATION
2	EVALUATION DEFINITION	Health	Weight/Temperature	Comprehensive annual check-up
3	A DAILY LIFE COMPARISON	Education	Grades	Report card
4	M&E IN RBM: COMPARISON	Gardening	Growth	Quality of food at harvest time

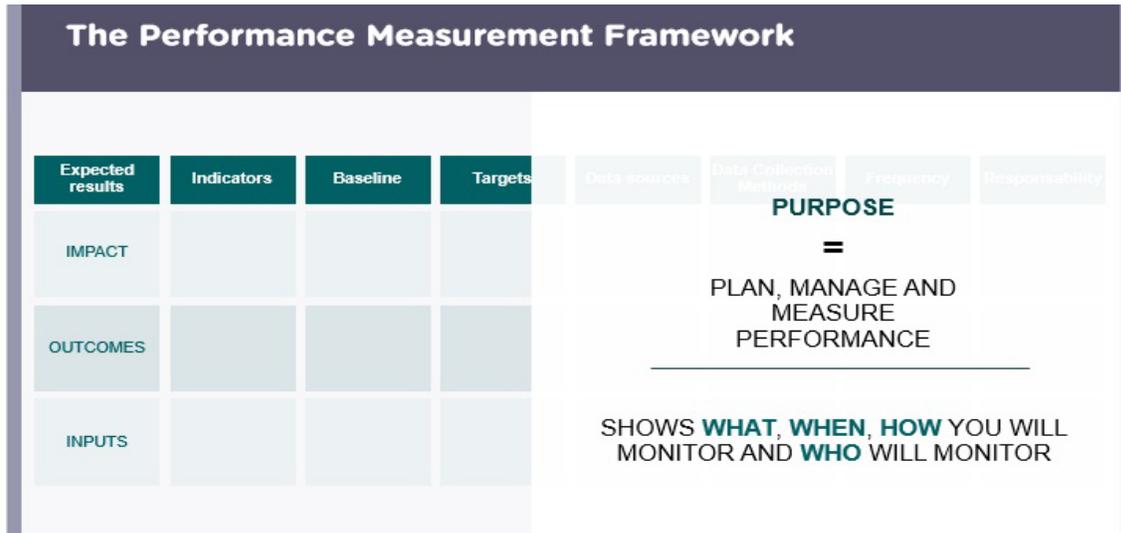
M&E in RBM: Comparison:

Differences Between Monitoring and Evaluation				
1	MONITORING DEFINITION	ASPECT	MONITORING	EVALUATION
2	EVALUATION DEFINITION	Frequency	Continuous and regular	Periodic/Episodic: at important milestones such as mid-term or end of a project/program
3	A DAILY LIFE COMPARISON	Main Action	Keep track/Oversight: document progress	Conduct in-depths analysis of processes and achievements
4	M&E IN RBM: COMPARISON	Purpose	Improve efficiency, inform decision-making and management during implementation	Assess overall effectiveness and impact, reflect on and learn from experience
		Answers	What activities were implemented, and what results were achieved	Why and how results were achieved
		Information sources	Routine systems, field observations, progress reports, etc.	Same, plus additional and more in-depth methods
		Undertaken by	Project managers, field staff, supervisors, founders, community	Program managers and teams, community, founders, external evaluators





The Performance Measurement Framework



The performance measurement framework (PMF for short) is the **main tool for organizing monitoring**. It also helps with reporting.

We'll learn more about reporting in the next quest.

The purpose of the PMF is to **plan, manage and measure performance**.

It is a simple tool that shows **what, when, how** you will monitor, and who will do it. A PMF has 8 columns, each with a specific purpose.

Planning for monitoring starts with populating the first column with the result statements from the logic model.





The Indicators

Column 2 - The Indicators							
Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
IMPACT							
OUTCOMES							
IMPUTS							

Definition:

An indicator helps **measure progress over time**. It provides **evidence** that a result has been achieved or is progressing towards achievement.

An indicator is a means of measuring actual results against planned results in terms of **quality**, **quantity** and **timeliness**.

Indicators are like “signals” that help measure results and reveal progress of specific objectives.

Column 2 - The Indicators



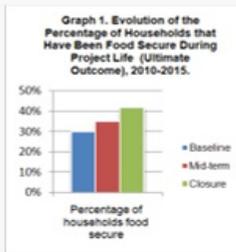
1
DEFINITION

2
NEUTRALITY

3
WHY DO WE NEED THEM

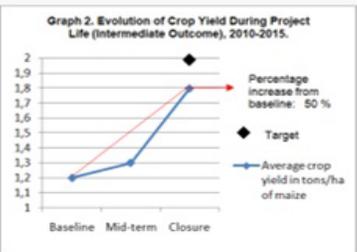
Shows whether a result has been achieved or is progressing.
Measures quality, quantity and timeliness of actual results against planned results.

Graph 1. Evolution of the Percentage of Households that Have Been Food Secure During Project Life (Ultimate Outcome), 2010-2015.



Phase	Percentage of households food secure
Baseline	30%
Mid-term	35%
Closure	45%

Graph 2. Evolution of Crop Yield During Project Life (Intermediate Outcome), 2010-2015.



Phase	Average crop yield in tons/ha of maize
Baseline	1.2
Mid-term	1.3
Closure	1.8

Percentage increase from baseline: 50 %

Target: 1.8

CONCEPTS

44

QUEST 3



Neutrality:

Indicators are **neutral**, meaning they do not include a direction of change. For example, “height of child” is an indicator, but “*increase* in height of child” is not.

Column 2 - The Indicators



1
DEFINITION

2
NEUTRALITY

3
WHY DO WE NEED THEM

Indicators are neutral
=
they do not include a direction of change



Why Do We Need Them:

Tracking indicators can help us test the assumptions and hypotheses we made when we developed our logic model.

Indicators can also be seen as an early warning system for identifying problems

Our assumptions and hypotheses may need rethinking and our actions may need adjustment. Some things we had planned may no longer be relevant, due to rapid changes or challenges during implementation.

Column 2 - The Indicators

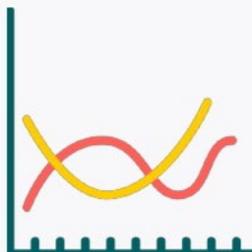


1
DEFINITION

2
NEUTRALITY

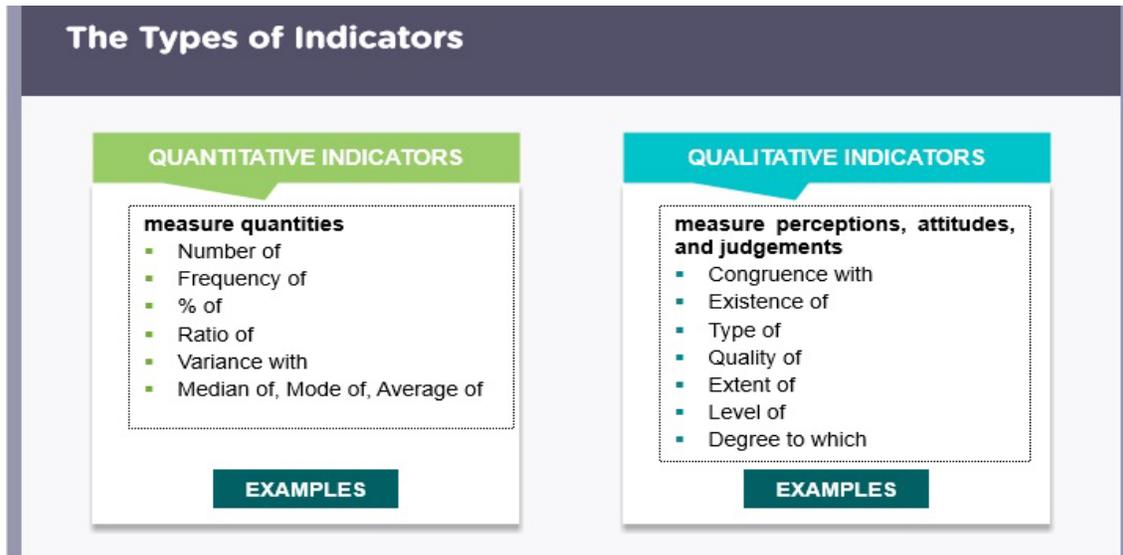
3
WHY DO WE NEED THEM

Indicators help us check what happened versus what was planned





The Types of Indicators



Indicators can be either quantitative or qualitative.

A solid PMF includes a good mix of both, but you don't necessarily need them in equal numbers. It's normal to have more quantitative indicators than qualitative ones, as qualitative indicators can be more difficult to deal with.

However, you should try to have a few good qualitative ones for every result you're working towards.

Quantitative indicators measure quantities and are numerical. They may be stated as:

- Number of
- Frequency of
- Percentage of
- Ratio of
- Variance with
- Median of, Mode of, Average of

Qualitative indicators measure perceptions, attitudes, and judgements. They may be stated as:

- Congruence with
- Existence of
- Type of
- Quality of
- Extent of
- Level of
- Degree to which





Examples of Qualitative Indicators

- **Degree to which** gender equality is integrated into municipal strategic plans, by municipality
- **Level of awareness** of adolescent men, women, and non-binary people in target communities of sexual and reproductive health services that are available, by community, gender, and age
- **Quality of** climate adaptation strategies promoted by extension workers, against a benchmark
- **Extent to which** project beneficiaries participate in project planning, by gender
- Parents' **beliefs** about the importance of girls completing secondary school education, by gender
- Participants' **level of confidence** in their capacity to apply climate-adapted techniques, by gender and hectare of land under household cultivation
- **Perceptions of** personal safety on public transportation, by gender
- Local women's rights organizations' **knowledge of** relevant human rights frameworks and mechanisms
- **Congruence of** care received by children in primary care clinics with defined standards

Examples of Quantitative Indicators

- **Frequency of** youth consultation meetings
- **Percentage of** children under 5 in participating communities experiencing diarrhea in the past month
- **Number of** male and female students benefiting from access to special education, by school
- **Number of** households in project area reporting use of energy efficient cook stoves
- **Percentage of** workshop participants who scored at least 80% on post-training test, by gender and role in their organization
- **Number of** police stations with gender-sensitive protocols for responding to victims and survivors of gender-based violence
- **Ratio of** women to men in leadership positions on local water and sanitation committees
- **Average number of** hours per day spent on paid and unpaid work, by gender and age
- **Average distance** in kilometers from home to nearest clean drinking water source





Benchmarking Indicators

Benchmarking Indicators	
Benchmark scale for indicator: Level of participation by Region 3 schools in disaster risk management initiatives.	
BENCHMARKS	DEFINITIONS
Very Low	School has not participated in any organized disaster risk management activities, but may have distributed awareness-raising materials.
Low	School has participated in one disaster risk management training workshop and distributed awareness-raising materials.
Adequate	School has participated in both disaster risk management training workshops and distributed awareness-raising materials.
High	School has participated in disaster risk management training workshops, distributed awareness-raising materials, established a DRM committee, and conducted a simulation exercise.

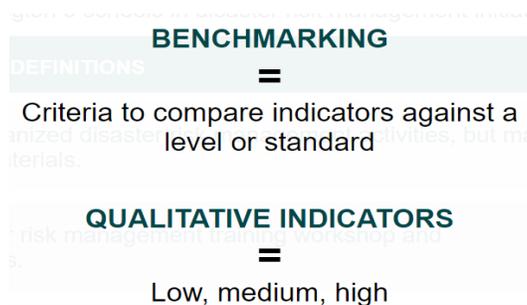
Benchmarking is a process in which you define criteria to compare an indicator (usually qualitative) against a **level** or **standard**.

The benchmark specifies the measurement for “quality of”, “adequacy of”, “degree of”, “evidence of”.

For example: it defines what is meant by “Low, medium, or high”.

In some cases, it can also be used for a quantitative indicator, using a range. See the examples below.

Benchmarking Indicators	
Example: Benchmark scale for qualitative indicator: Quality of gender integration in new policies and procedural guidelines.	
BENCHMARKS	DEFINITIONS
Gender blind	The policy or procedure does not mention or take into account the impact of social gender roles. Gender-differentiated impacts or experiences of the policy or procedure are not addressed.
Gender accommodating	The policy or procedure shows awareness of existing gender norms and practices and may work around or reinforce them.
Gender sensitive	The policy or procedure is designed to ensure equal participation by different genders and seeks to ensure that outcomes do not exacerbate inequalities.
Gender responsive	The policy or procedure reflects analysis of gender differences in needs, impacts, and access and includes measures to address these in processes and outcomes.
Gender transformative	The policy or procedure recognizes the existence of discriminatory gender norms and practices at the root of inequality and seeks to change these through its processes and outcomes.





Disaggregating Indicators

Defintion:

Breaking down an indicator according to a significant category or characteristic, such as:

- Gender
- Income level
- Disability
- Geography/Location
- Age
- Ethnicity
- Other variables

is called disaggregation.

Why Disaggregate?

It is useful to disaggregate:

- To highlight specific characteristics in a measurement, such as gender or sex, age, region, ethnicity, income level, ability, or disability
- To provide more information about how results benefit or affect different groups
- To find out more about who or where our information comes from. People, groups, and places differ from each other, and these differences affect how projects or activities work or are experienced. Sometimes the information we get from our indicators is not very helpful or meaningful unless we break it down according to different characteristics.

Remember: Think about and address any potential risks to project participants. For example, in many contexts it may not be safe or comfortable for people to be identified as LGBTQIA2S. A safe and supportive environment for self-identification may be fostered, but 'do no harm' must always be the first principle.

Disaggregating Indicators

1
DEFINITION

2
WHY DISAGGREGATE?

3
EXAMPLES

- Highlight specific characteristics in a measurement
- Inform on how results benefit or affect different groups
- Find out more about who or where our information comes from





Examples:

Disaggregating Indicators



1 DEFINITION	<ul style="list-style-type: none">Percentage of early childhood school leaders with post graduate certification, disaggregated by region, gender, and type of certificationParticipants' level of confidence in their capacity to apply climate-adapted techniques, disaggregated by gender and hectares of land under household cultivationProportion of women, men, and non-binary people in leadership positions on local water and sanitation committees, disaggregated by municipal districtAverage number of hours per day spent on paid and unpaid work, disaggregated by gender and age
2 WHY DISAGGREGATE?	
3 EXAMPLES	

Indicators for Each Results Level

Indicators for Each Results Level

IMPACT	Impact indicators measure changes in conditions or state . <i>Example: Percentage of households living above the basic poverty line in Haiti.</i>
OUTCOMES	Outcome indicators measure changes in behaviours, practices, attitudes, skills, access, knowledge, or awareness . <i>Example: Adolescent boys' attitudes toward the idea of gender-equitable distribution of unpaid caregiving work.</i>
OUTPUTS	Output indicators describe what is produced . <i>Example: Proportion of Jamaican diaspora organisations that have established educational funds.</i>

Indicators are defined at each results level: impact, outcome, and output.

Impact indicators measure changes in conditions or state.

Outcome indicators measure changes in behaviors, practices, attitudes, skills, access, knowledge, or awareness.

Output indicators describe what is produced.





Anatomy of an Indicator

Developing Indicators – Anatomy of an Indicator		
Unit of measure	Unit of analysis	Context
# (Number of)	emergency shelters (urban/rural)	with reduced vulnerability to landslides, flooding and other climate-related events.
	new policies	that have been developed for inclusive education.
% Total	enrolled students (by gender)	completing degree programs in natural resource management.
	students with special needs	enrolled in specialized programs.
Degree to which	parents or adult caregivers of project participants (by gender)	adopt positive attitudes towards gender equality.
	education infrastructure	meets international standards each year.

Indicators are composed of three main elements:

- A unit of measure
- A unit of analysis
- The context

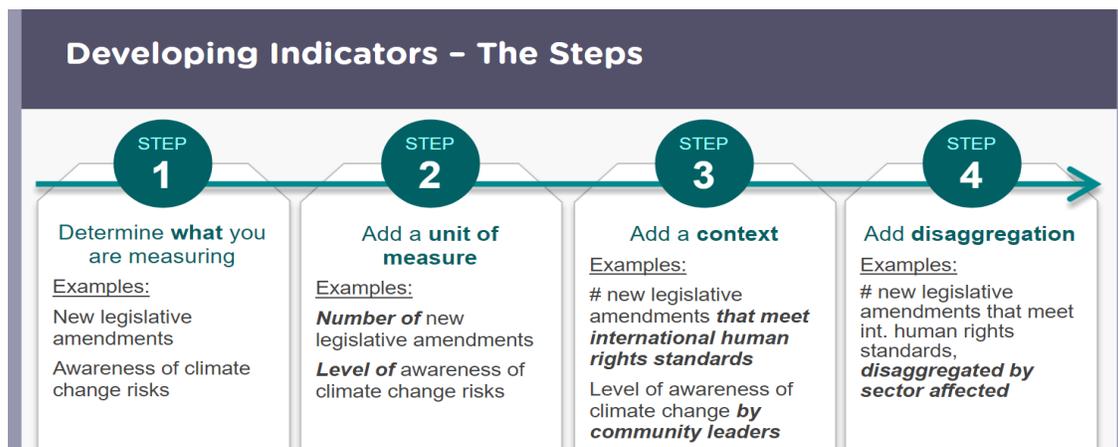
The Steps to Developing Indicators

When selecting an indicator, we need to ask ourselves:

- What does the result mean?
- How do I know that the result has been achieved?

There are four steps to developing indicators:

- **Step 1:** Determine **what** you are measuring - for example: *New legislative amendments, or awareness of climate change risks*
- **Step 2:** Add a **unit of measure** - for example: *Number of new legislative amendments, level of awareness of climate change risks*
- **Step 3:** Add a **context** - for example: *new legislative amendments that meet international human rights standards or awareness of climate change by community leaders*
- **Step 4:** Add **disaggregation** if relevant - for example: *Number of new legislative amendments that meet international human rights standards, disaggregated by sector affected or level of awareness of climate change by community leaders, disaggregated by gender*





Criteria

To check whether the developed indicators are strong, you can use these 6 criteria:

- **Validity:** Will this indicator really measure the result?
- **Reliability:** Will the measurement be consistent over time?
- **Simplicity:** Will it be easy to collect and analyze information about this indicator?
- **Utility:** Will the information collected about this indicator help with learning and decision-making in the project?
- **Affordability:** Do we have enough time and money to collect information about this indicator? Is the data collected worth the effort and expense?
- **Neutrality:** Does the indicator include a target measurement? It should not! For example, an indicator of your speed in a race is “# of kilometres per hour” not “20 kilometres per hour”. The indicator of your success on a test is “# of correct answers out of 20”. Your target might be 18/20, but “18 correct answers out of 20” is not the indicator itself.

How Many Indicators?

Choosing indicators is about striking the right balance between what you need and what is practical.

Indicators should be few enough so that your monitoring activities do not become a burden, and numerous enough to cover all the major outputs and outcomes of the program.

Here are some guidelines:

- Choose the minimum number that supports the sufficient and successful measurement of a given level of result
- Choose enough to be able to measure the same result from different angles - it's called triangulating

Do not plan to collect too much information: it is costly, time-consuming, and, most often, unnecessary.

Criteria for Developing Indicators



1
CRITERIA

2
HOW MANY INDICATORS?

To determine the number of indicators:

- Choose a minimum number to measure sufficiently and successfully
- Choose enough to measure from multiple angles
- Consider cost, time, and need

You will find a checklist to help you develop indicators in the Resources section.





Exercises: Strong & Weak Indicators

Exercise Answer Sheet:

Increased vaccination



This indicator is not **neutral** because it states the desired direction of change (increased); it does not specify **context**; and it would be strengthened by having some **disaggregation**.

- Better indicator:** Percentage of children under five in the project area who are up to date on standard vaccinations, by gender, age, and zone of residence.

Level of satisfaction by teachers with the licensing process, by gender and region



This indicator is strong because it includes the **unit of measure**, the **context**, and relevant **disaggregation**.

Degree of cooperation among community-based organizations on WASH facilities maintenance



This indicator is strong because it includes the **unit of measure**.

NOTE: It would require **benchmarking** to define different degrees of cooperation (low, moderate, high).

Number of students who graduate from targeted job-skills program, by gender and district



This indicator is strong because it includes the **unit of measure**, the **context**, and **disaggregation**.

Attitudes about culturally-sensitive care



This indicator is missing part of its **unit of analysis**; it does not specify **whose attitudes**, or the **context** of care. It could also be improved by **disaggregation**.

- Better indicator:** Attitudes of community health centre staff about providing culturally-sensitive care to users, by gender and role.

Number and quality of meetings between neighbourhood association leaders and municipal planning staff, by municipal district



This indicator is strong because it includes the **unit of measure**, and the **context**.





By 2030, access to sexual and reproductive health (SRH) services rises to 45%



This indicator is not **neutral** because it states the direction of change and the target (rise to 45% access by 2030) and more **context** is needed.

- Better indicator:** Percentage of adolescents in targeted areas with access to SRH services (defined as within 5 km from home).

Number of lawyers trained in inclusive practices



This indicator does include the **unit of measure**, but it requires more **context** and could be strengthened by **disaggregation**.

- Better indicator:** Number of lawyers from participating organizations or firms trained in inclusive practices, by gender and level of seniority.

By 2024, at least four municipal policies or procedures amended to include gender-sensitive content



This indicator states the **target** (four policies by 2024) and more context is needed.

- Better indicator:** Number of municipal policies or procedures amended to include gender-sensitive content.

Number of hectares of market garden crops cultivated by women who are heads of households in participating communities



This indicator is strong because it includes the **unit of measure** and the **context**.

Number of students with identified exceptionalities enrolled in special education facilities in project area



This indicator is weak because, although it includes the **unit of measure** and the **context**, it could be improved by **disaggregation**.

- Better indicator:** Number of students with identified exceptionalities enrolled in special education facilities in the project area, by gender of students and by facility.





PMF Overview

The Performance Measurement Framework - Overview							
Agroforestry Co-operatives Project (PMF excerpt)							
Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
OUTCOME 1 Increased adoption of climate-adapted production practices by agroforestry cooperatives	# of participating co-ops reporting adoption of new climate-adapted practices, disaggregated by practice	3 of 7 agroforestry co-operatives in Santa Ana use 1 or 2 climate-adapted practices (from a list)	All 7 co-operatives use 2 or more climate-adapted practices, including at least 1 for production and at least 1 for processing, by end of Year 3.	Co-operative leaders and members; co-operative members' land and co-op facilities; co-op records	Field observation; desk review	Annual	Local project team; project extension worker

Here is a guided tour of a PMF.

1. The first column contains the results from the **logic model**.
2. The second column contains the **indicators** for each result statement of your logic model.
3. The third column holds **baseline data** - if available - for each of the selected indicators. This is the starting point from which to measure change over time.
4. The fourth column contains the **targets** that specify a particular value for performance throughout the project cycle (in other words, what we want to achieve).
5. The fifth column contains the **data sources**. This is where you will obtain the information necessary for measuring progress towards results. These could be primary sources (e.g., people, locations, organizations, artifacts, raw data) and secondary sources, (e.g., reports, studies, and reviews).
6. The sixth column contains the **data collection methods**, that is, how information is gathered. Methods will vary depending on the type of data.
7. Column 7, **Frequency**, is how often you will collect data. The higher the level in your logic model, the less frequently you might collect data. The frequency is also linked to your funding cycle. If you report quarterly, then, at minimum, you should be collecting data quarterly at output levels.
8. The last column, **Responsibility**, states who will collect, analyze or report on data.

Explore some of these columns in more detail in the following sections.





Baseline Data

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
IMPACT							
OUTCOMES							
IMPUTS							



Baseline data is usually (and ideally) collected prior to the start of the project/program in order to:

- Understand the reality on the ground
- Provide a point of comparison for tracking change

BASELINE DATA CHECKLIST

- ✓ Is there baseline data for each indicator?
- ✓ Do the units of measure and analysis match the units of measure and analysis in the indicators and target?
- ✓ Is the baseline for indicators that deal with people disaggregated by gender and other categories (age, ethnicity, etc.) wherever possible?
- ✓ If baseline data has not yet been collected, does the PMF indicate when it will be?

Targets

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
IMPACT							
OUTCOMES							
IMPUTS							



Targets establish what you intend to achieve by the end of a project, but they can also be set for yearly reviews. They should be set after setting the baseline, and should be based on experience and practicality/reality/achievability

TARGETS CHECKLIST

- ✓ Are the targets realistic and achievable? A project team should be able to agree on what is realistic based on experience with other similar projects, baseline studies, consultations with project stakeholders and participants, and reviews of planned activities and timelines.
- ✓ Do the targets specify achievement dates?
- ✓ Do the units of measure in the indicators match the units of measure for the baseline data?
- ✓ Are the targets for indicators that deal with people disaggregated by gender and other necessary social categories (age, ethnicity, etc.) wherever possible?





Data Sources

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
IMPACT							
OUTCOMES							
IMPUTS							



Data sources refer to the individuals, organizations, documents, or other places or things from which the data is obtained – that is, where you will get your data.

You must identify a data source for each selected indicator. It is important to choose a range of data sources to support triangulation.

DATA SOURCES CHECKLIST

- ✓ Does the information in the data sources column identify the individuals, groups, organizations, documents, or other sources from which data about indicators will be obtained?
- ✓ Will each data source allow you to receive timely performance information?
- ✓ Are the data sources appropriate for the information you need?
- ✓ Are the data sources diversified, credible and reliable?

Data Collection Methods

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
IMPACT							
OUTCOMES							
IMPUTS							

Methods of data collection will vary depending on the type of data you are collecting, and how participatory your monitoring process is. Some methods are more formal and structured, and some less. Some methods can be used to collect both quantitative and qualitative data.

A few common data collection methods include:

QUANTITATIVE INDICATORS

- Surveys
- Census
- Direct measurement
- Photography
- Document review

QUALITATIVE INDICATORS

- Interviews
- Focus group discussion
- Structured observation
- Video journaling
- Case study or story collection

Data Collection Methods Checklist



DATA COLLECTION METHODS CHECKLIST

- ✓ Will the method give you the information you need? (data requirements)
- ✓ Is the information or data source available?
- ✓ Will your data be appropriately accurate and precise?
- ✓ Will your data collection be participatory?
- ✓ Do you have the time, skills, and resources needed to carry out this method?
- ✓ Have you pre-tested any tool required for this method, or included pre-testing in your plans? (For example, a survey questionnaire should be tested on a small sample of respondents, or at least a few colleagues or friends before it is used.)





Exercises: Practising Working with PMFs

Exercise 1:

Look at this excerpt from Peace & Play's PMF, for Outcome 1; do you see anything wrong? **EXCERPT**

- Everything is fine
- The Data Source column is wrong. If the data collection method is "document review", then the data source cannot be "children". The data source would be "project records, attendance records"
- Document review" should be under "Data Sources"

DISPLAY FEEDBACK **CONTINUE**

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsa bility
OUTCOME 1 Increased opportunities for children to meet and interact with diverse children from different islands in a gender-equitable and inclusive environment	# of children who have spent time using the play space within the last six months, by gender, age, and island of residence	0	1,000 children spend time using the play space in each 6-month period, with even distribution by gender, age (between 7 and 13), and island of residence	Children	Document review	Semi-annual	Project team

Be careful not to confuse the *data sources* and the *data collection methods*. Read their descriptions in the previous screens again if needed.

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsa bility
OUTCOME 1 Increased opportunities for children to meet and interact with diverse children from different islands in a gender-equitable and inclusive environment	# of children who have spent time using the play space within the last six months, by gender, age, and island of residence	0	1,000 children spend time using the play space in each 6-month period, with even distribution by gender, age (between 7 and 13), and island of residence	Children Project records, attendance records	Document review	Semi-annual	Project team





Exercise 2:

? Look at this other excerpt from Peace & Play's PMF, for Output 1.2; what's wrong? **EXCERPT**

- At the output level, indicators should usually be monitored more frequently than once a year
- The target is too high, given the fact that there is no baseline available
- The data collection methods and the data sources have been mixed up
- There is nothing wrong

DISPLAY FEEDBACK **CONTINUE**

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
OUTPUT 1.2 Activities promoting non-traditional gender roles developed and facilitated with children visiting the play space	% of children participating in various non-traditional gender role activities in the play space, disaggregated by gender and activity	0	90% of children visiting the play space at any given time take part in non-traditional gender role activities	Play space records	Document review	Annual	Project team

Monitoring outputs "annually" is not appropriate. **X**
 Monitoring should be more frequent for outputs because outputs can show early signals that something is not working as expected and can be more easily adjusted as you go along.
 The target may be unrealistically high.

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
OUTPUT 1.2 Activities promoting non-traditional gender roles developed and facilitated with children visiting the play space	% of children participating in various non-traditional gender role activities in the play space, disaggregated by gender and activity	0	75% of children visiting the play space at any given time take part in non-traditional gender role activities	Play space records	Document review	Annual Quarterly	Project team





Exercise 3:

? Finally, look at this other excerpt from Peace & Play's PMF, for output 2.1. What's wrong? **EXCERPT**

- The data collection methods and the data sources have been mixed up
- Peace & Play forgot to specify the period for the target
- There is nothing wrong

DISPLAY FEEDBACK **CONTINUE**

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
OUTPUT 2.1 Inclusive games designed and played by children in the play space	# of children participating in game design, by gender, age, island of residence, and number of times each individual has participated in game design	0	300 children participate in game design	Play space records	Document review	Quarterly	Project team

At output level, for an indicator like this – a total number rather than a percentage – it is useful to set a specific timeframe for the target, to assist the project team with planning and give them a chance to adjust activities as needed.

Also, Peace & Play should probably set a target for the level of participation by different groups. They could specify that participation be evenly distributed by gender and island of residence.

Expected results	Indicators	Baseline	Targets	Data sources	Data Collection Methods	Frequency	Responsibility
OUTPUT 2.1 Inclusive games designed and played by children in the play space	# of children participating in game design, by gender, age, island of residence, and number of times each individual has participated in game design	0	300 children participate in game design each quarter	Play space records	Document review	Quarterly	Project team



Summary and Notes

The Peace & Play team saw how useful monitoring was.

Are you also more aware of what monitoring means for your project?

In this quest you saw that:

- Carefully developed indicators help you check your progress and adjust your approach and activities throughout the project cycle.
- A strong indicator is developed using six criteria.

The indicators are included in the main tool for organizing your monitoring - the PMF.



Quest 4: Reporting

Peace & Play: What Should we Report?

 Team, it's time to prepare the annual report for our play space project.

 Who will read our report?

 All the stakeholders involved in the project – and us!

 The stakeholders will want to know if we are on track, how much we have spent so far, what is going well and not so well...

 Are we going to write about every result?

 We can include all the relevant monitoring data in an appendix, but in the narrative, we'll highlight key results and discuss challenges. Our goal is to be informative and transparent...

 ... and state what we are going to do to adjust anything that's not going so well.

 Phew! I thought we'd have to include every detail!

 Well, we do have to report whatever outcome data we have, but we can choose what we want to highlight, like our key achievements, anything unexpected...

 ... and the trends we detected.

 It's important to discuss why the results are what they are – for example, if we have not met our targets on some indicators.

 Like the target for the number of children attending the play space?

 Yes, we're almost on target, but when we look at the percentages of non-binary, boys and girls coming to the park, it's not evenly distributed.

 Right. So, we're going to analyze why.

 Are we going to talk about why Choumi Island is underrepresented?

 Absolutely. We'll include anything we consider important to explain our results.

 Let's recap. What are some of the things going into the annual report?

 First, that our project is going really well! Everybody is learning a lot from each other, and almost all parents and children think it's great.

 That's right. But we also need to mention some challenges. For example, that we're attracting a larger proportion of girls and that Choumi Island is underrepresented, as well as the possible reasons we've just discussed.

 Can we improve in these areas?

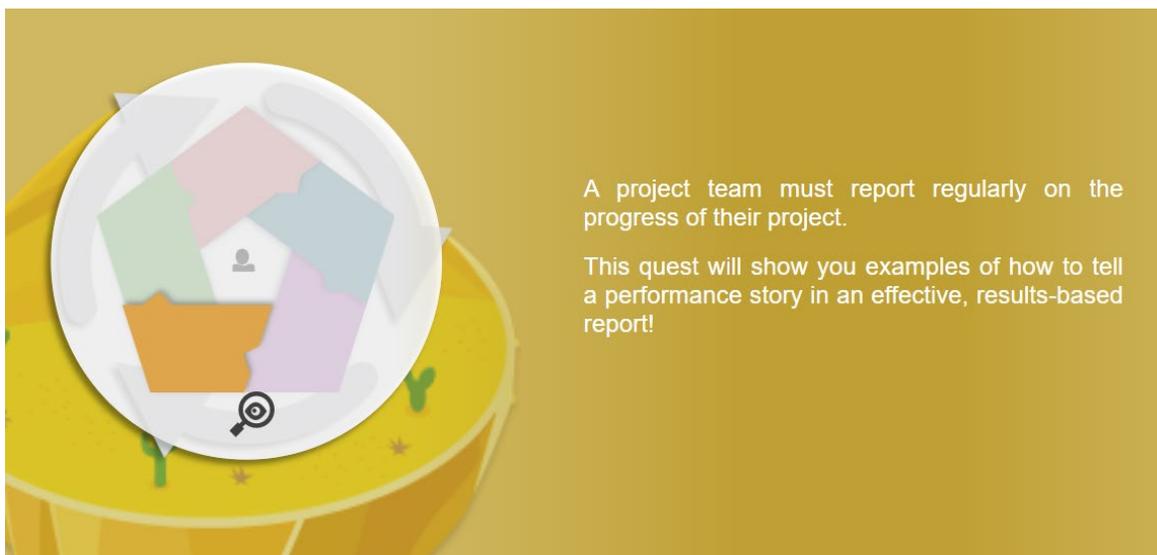
 Yes, we need to brainstorm and talk with our community members, parents and children to come up with some solutions.

THE END





Quest Objectives



In RBM, the primary goal of monitoring is to check whether the project is on track, so that it can be adjusted accordingly.

It is important to communicate relevant findings that arise from monitoring to all the stakeholders in an effective way.





What is Results-Based Reporting

What is Results-Based Reporting



It is an **accounting** of:

- **progress towards** achieving your **results**
- **change** that has occurred because of your interventions
- **challenges** faced
- and **proposed solutions** or **mitigation strategies**.

Results-based reporting should demonstrate the link between activities and actual results, on each level of the logic model, using indicators.

It is **not** merely a listing or accounting of completed activities and deliverables.

Results-based reporting in RBM is the **periodic accounting** of project implementation to stakeholders, such as donors, project staff, project beneficiaries or participants, and to other partners such as governments or other civil society organizations.

A results-based report documents completed activities, highlights changes that have come about as a result of these activities, and discusses project implementation processes, as well as challenges and lessons learned. The PMF is the key tool that supports results-based reporting.

Reporting: Guiding Questions

Some guiding questions that can be used for results-based reporting include:

- What is different now that activities have been completed?
- Who was directly involved and what are they now doing differently?
- Over time, what changes in the organization or community can you observe? Who is being affected?
- How do you know changes have occurred since baseline data was collected?
- What helped or hindered the achievement of results?
- Did anything unexpected occur?
- What could be done differently in subsequent activities or projects to improve such programming?





Here are examples:

Reporting: Guiding Questions

QUESTION	REFERS TO
What is different now that activities have been completed?	Outputs
Who was directly involved and what are they now doing differently?	Outcomes
Over time, what changes in the organization or community can you observe? Who is being affected?	Impact
What helped or hindered the achievement of results? Did anything unexpected occur?	Challenges or best practices
What could be done differently in subsequent activities or projects to improve such programming?	Lessons learned

What helped or hindered the achievement of results?

The output of gender awareness workshops in Years 1 and 2 helped achieve desired results. They met the target of 100 participants and saw roughly half men and half women or non-binary people taking part.

In addition, when reporting on these results, the team might point out that these results have been promoted by modeling of gender equal and inclusive approaches by program staff and efforts to make technical assistance activities accessible to everyone.

EXAMPLE

What is different now that activities have been completed?

After carrying out all the activities associated with planning and carrying out technical assistance, the project team has produced Output 2.1: Technical assistance provided to co-op leaders on financial, marketing, and governance topics. How do you know changes have occurred since baseline data was collected?

Evidence in the data shows a change in the following outcome indicator:

Co-op members' rating (on a scale) of the extent of participation in management activities by members who are women, non-binary, youth, indigenous, or identified with other relevant categories, disaggregated by gender, age, and other relevant categories.

At baseline, only 20% of women rated participation of women as "high. After two years of the project, now 35% give it that rating.

EXAMPLE

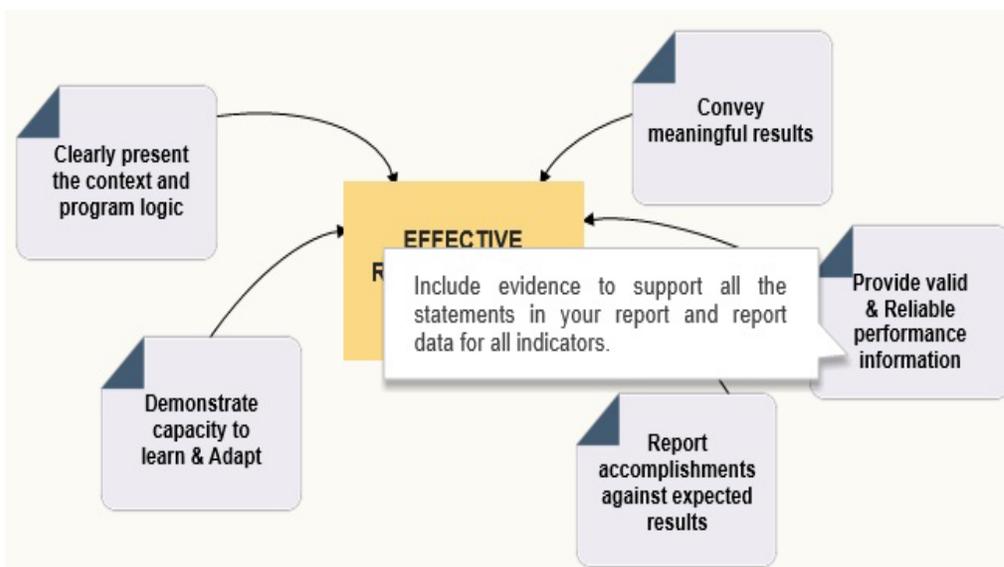
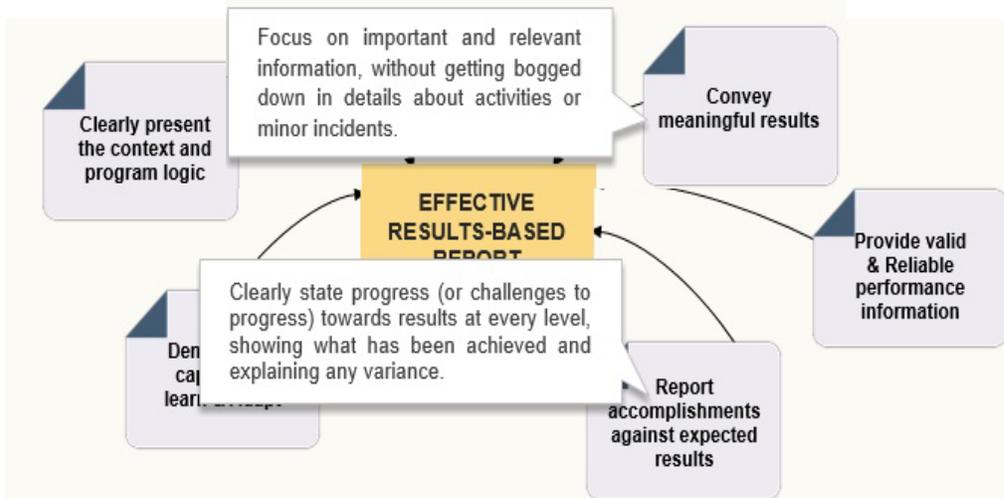
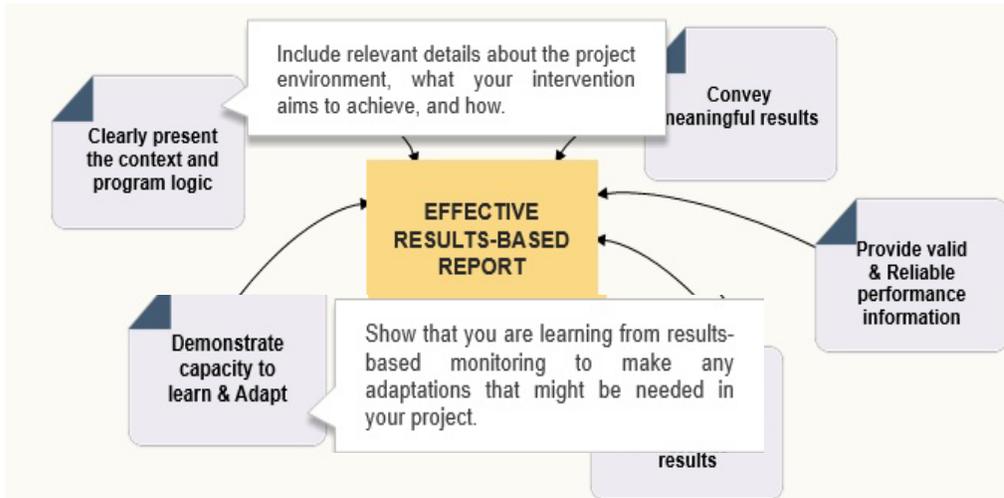
EXAMPLE

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Zoom in on the Elements of a Report





Quality Criteria for Results-Based Reports



Here are the criteria that you can use to make sure your report is good to go:

- Is your report **complete**? Does it cover all the bases and provide sufficient information?
- Is your report **balanced**, meaning that it contains a mix of "good" and "bad"?
- Is the content of your report **reliable**? In other words, are the findings based upon presented data?
- As for any report or communication: are the **layout** and **wording consistent**?

Is the content **clear** - does it, adequately convey what occurred?

How to Use the PMF to Report?

The PMF is a key tool to help you write effective reports. Use it to monitor your project on an ongoing basis and before you submit every report.

Here is how we suggest using the PMF to help you write your reports:

- Look at the data collected for each indicator to gather specific information for each result. Select key indicators to capture progress being made towards the expected results. Indicators should be used to 'flesh out' results-based information. Note that as the project evolves, you may want to add new indicators.
- Note the challenges experienced, towards yearly targets, and against the baseline.
- Observe if there is any variance between your actual data and your targets and explain it.

Cross-check your observations using the other indicators, sources, and methods of data collection in the PMF to provide further information on results.





Illustrative Example of Reporting Using The PMF

INDICATORS	BASELINE	TARGETS	PROGRESS/ RESULT (this period April 2021)	CUMULATIVE DATA (from inception to October 2020)	CUMULATIVE DATA (including this reporting period, and % of progress completed if applicable)
Percentage of children from migrant households with access to socio- economic support and empowerment systems	25% of children from migrant households have access to socio-economic support and empowerment systems	50% of children from migrant households have access to socio-economic support and empowerment systems	8% increase in access	4% (29%)	12% (37%)

? Look at this excerpt from a PMF for this outcome: **Increased access of migrants' children to socio-economic support and empowerment systems:** Read their report and answer the following question: **What did the project team do in their report?**

EXCERPT

REPORT

Select the correct answers and click on **SUBMIT**.

- They highlighted the outputs they achieved
- They demonstrated the link between the outputs and the outcome
- They used data from their PMF
- They explained their strategy for improving their results
- They explained an unplanned output

DISPLAY FEEDBACK **CONTINUE**

Analysis of progress under outcome

There has been a *considerable increase in access to socio-economic support and empowerment systems* by children of migrant households across the region since this project started. When the project began, *25% of migrant children reported having access to such services and systems*. Several outputs achieved, especially the establishment of 400 youth centres and the development of targeted public education and sensitization programs, have led to an increase in awareness of available services among migrant families and an *8% increase of child use of socio-economic and empowerment support services* during the reporting period.

In addition, recent legislative changes that designate caregivers or designated guardians for children, elderly people, persons with disabilities, and other vulnerable persons in migrant households has had a positive effect on children's access to socio-economic support.

While not originally planned as an output of the project, this legislation *has contributed to the increase in children's access to socio-economic support and empowerment systems* reported during this period.

Simply copying information from the PMF is not enough to communicate your results effectively. The team did a good job of highlighting some activities that were accomplished and they analyzed the link between completion of these and the results they are getting. They also cited data from their monitoring indicators as evidence of progress at the outcome level. In this excerpt, they did not explain any strategies for adapting activities or improving results – but they probably have a section in their report that does.





Exercise: Practice Telling a Performance Story in a Report


Read the excerpts from the PMF on the Youth Participation Project you saw in quest 2 and compare it to excerpts from a report its team wrote.

Then answer the following questions.

EXCERPT Outcome 1
EXCERPT Outputs

REPORT

This report looks at one outcome and uses its related output indicators to explain the results the project obtained. The report also talks about a positive, unexpected event that contributed to the highlighted results.

Select the correct answer for each line. Does the report:

	YES	NO
Reflect the data in the PMF?	<input checked="" type="radio"/>	<input type="radio"/>
Explain the results for the selected indicators?	<input checked="" type="radio"/>	<input type="radio"/>
Use the outputs related to an outcome to explain the results the project obtained?	<input checked="" type="radio"/>	<input type="radio"/>
Describe a positive, unexpected event that contributed to the highlighted result?	<input checked="" type="radio"/>	<input type="radio"/>

Excerpt – Outcome 1 and Analysis:

OUTCOME 1: Enhanced efforts by municipal governments to create and institutionalize gender-sensitive opportunities for diverse youth voices to be heard in decision-making

Analysis of progress under outcome 1

Young people have started to make important headway on engaging municipal officials in their communities to create more opportunities for youth concerns to be reflected in local decision-making processes (Outcome 1). When the project started, the only formal opportunity in any of the municipalities was one yearly youth forum - with a special young women's panel - in which young people were invited to discuss issues of concern to them with councillors and planning officials. By the end of the project's first year, two more municipalities had created similar events. The original municipality had also added a new monthly "youth council meeting" in which representatives of local school councils and youth organizations meet in the town hall to discuss issues of concern and then submit reports or proposals to a special session of council. These advances show that momentum is building, putting the project on track to meet its target of having operational at least one type of systematic, ongoing, accessible opportunity functional in all five municipalities by the end of the three-year period.

Unexpected support for the project came when a councillor from the original municipality who has been a champion of youth participation in recent years was elected president of a regional councillors' network. She has used the opportunity to spread the word about youth participation and showcase her own municipality's efforts, generating interest among other councillors.

The project has also supported youth outreach to municipal officials (Output 1.1). By the end of the year, youth representatives had met with officials in all five municipalities to explain how the youth forum works and share their views about issues such as lack of SRH services appropriate for adolescents, the need for more community sports fields, and a proposal for a jobs training program for high school students. Young people's confidence and effectiveness was supported through participatory advocacy workshops (Output 1.2) that encouraged them to work with others on identifying priority issues and coming up with strategies for influencing municipalities.

Excerpt – Outputs:

OUTPUT 1.1: Outreach conducted by local youth representatives with municipal government officials to promote the importance of youth participation

Indicator	Baseline	Target	Q4 Progress	Progress end of Y1
# of municipalities where officials reported that participating youth groups have communicated with them about youth participation in decision-making, by municipality	Officials from 1 municipality report having received outreach from youth groups on issues of concern within the last year (requesting funding for a youth centre)	Officials from each of the 5 municipalities report awareness of outreach by youth within the preceding quarter related to improving youth participation or to follow-up on particular issues of concern that youth have raised	3 officials from 1 municipality and 2 from each of 2 others reported visits from youth representatives to improve participation and follow up on youth issues in the preceding 3 months	A total of 19 officials from all 5 municipalities reported that youth had contacted them to discuss issues of concern, including improvements in mechanisms for youth participation.

OUTPUT 1.2: Participatory advocacy workshops facilitated with diverse and representative groups of local youth associations

Indicator	Baseline	Target	Progress end of Y1
# of workshops conducted	0	1 participatory advocacy workshop per year in each municipality facilitated in Years 1 and 2 with diverse representatives of local youth associations (total of 10 workshops by end of Year 2)	1 workshop completed in each municipality (total of 5 workshops)





Reporting on a Website

Sometimes, telling a specific story - for example, about an individual project participant or beneficiary - can help to make your results come alive.

You may want to include narratives of this kind in your reporting to illustrate your results in a way that is more accessible.

You can also use stories like the one about Vithu in communication with the public, for example, on a webpage.

16-year-old Vithu lives in a poor, informal community on the outskirts of the provincial capital. His older brother left school early to help support the family, and Vithu is under pressure to do the same. As a young man who is gay, he has a difficult relationship with his parents, teachers, and some peers in his community. He has faced bullying and even violence. One of his school teachers told him publicly that being gay was a disease. Still, he studies hard and wants to complete high school and go to university to become an engineer. He says he dreams of installing solar-powered electricity in his community, which has no access to the formal grid.

When the Youth Participation Project started at Vithu's school, he went to the first meeting with other friends interested in finding out how to encourage local authorities to respond better to young people's needs. Like them, he wanted to see more youth employment opportunities and training programs, recreation and violence prevention activities, and better sexual and reproductive health services accessible to everyone. When he arrived at the meeting, some students told him he wasn't welcome, but his friends supported him, and the project facilitator made it clear the group was a safe space for everyone. When Vithu saw the facilitator wearing a pin with the LGBTQIA2S symbol on it, he was very happy. He'd never seen an adult do that before.

Along with students from two other nearby schools, Vithu attended the project's first participatory advocacy workshop. He and others discussed issues that concerned them, and different ways to promote youth priorities to local authorities. The facilitators encouraged Vithu when he decided to speak up about particular issues affecting him as a young gay man. At first, he was nervous, but then some others shared similar experiences. A disabled student talked about some of the discrimination she faced, and how she wished there were sports or recreational activities accessible to her so she could socialize with others her own age outside of school.

Vithu felt proud when his peers chose him to be part of a delegation to a municipal council meeting. Even his parents were happy! During the meeting, Vithu and others explained their proposal for organizing youth council meetings every three months, where youth representatives could present their ideas and concerns to local authorities.

The councilors were impressed by their presentation, and agreed to try a pilot youth council meeting. For Vithu, being part of the Youth Participation Project has been an empowering experience. "Sometimes I feel like I don't belong anywhere," Vithu says, "but in the Youth Participation Project, I feel like I'm part of something positive, and that others accept me for who I am. I thought I would have to be older and get more education before I could do anything to make a difference in the world, but I'm already fulfilling my dream of helping my community!"



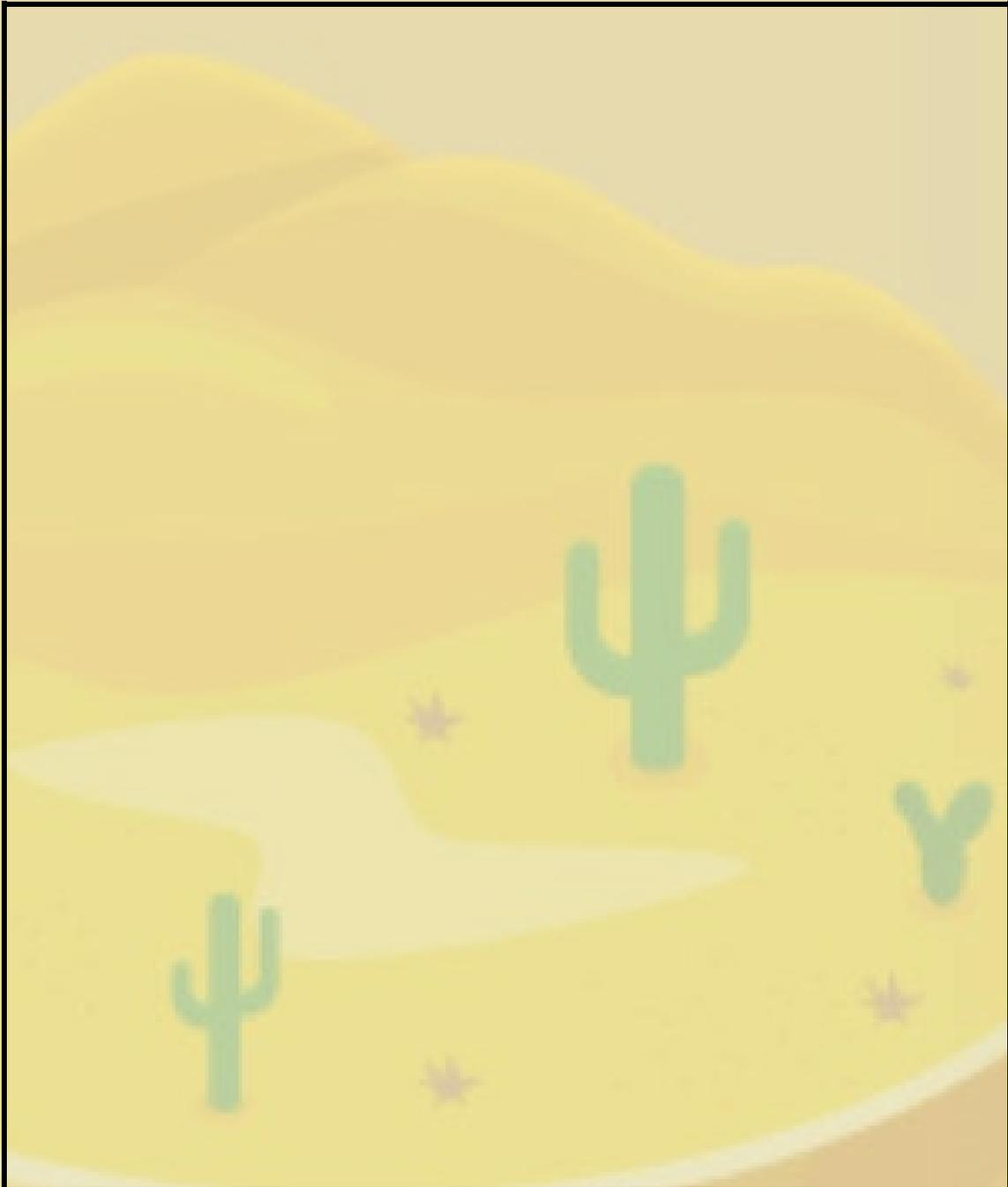
Summary and Notes:

The Peace & Play team discovered how to use the performance measurement framework as a basis for monitoring their project and communicating their results in reports that convey whether their progress has been excellent, promising or off track and in need of adjustment!

What about your project? Do you feel confident about reporting its results?

In this quest you saw:

- What is results-based reporting.
- What elements are necessary to write a compelling and effective report





Quest Objectives



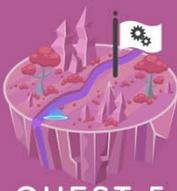
Learning in RBM involves analyzing monitoring and evaluation data to learn from experience and:

- Make decisions
- Adjust strategy
- Plan for future initiatives

By this process, the entire organization learns, not just the project team. For this learning to happen, some planning is necessary.

This quest will show you an example of how you can use RBM processes and tools to strengthen learning.

Through this quest, you will discover one way to use RBM processes and tools to make learning an ongoing and integral part of every project, through what is called “learning reviews.”





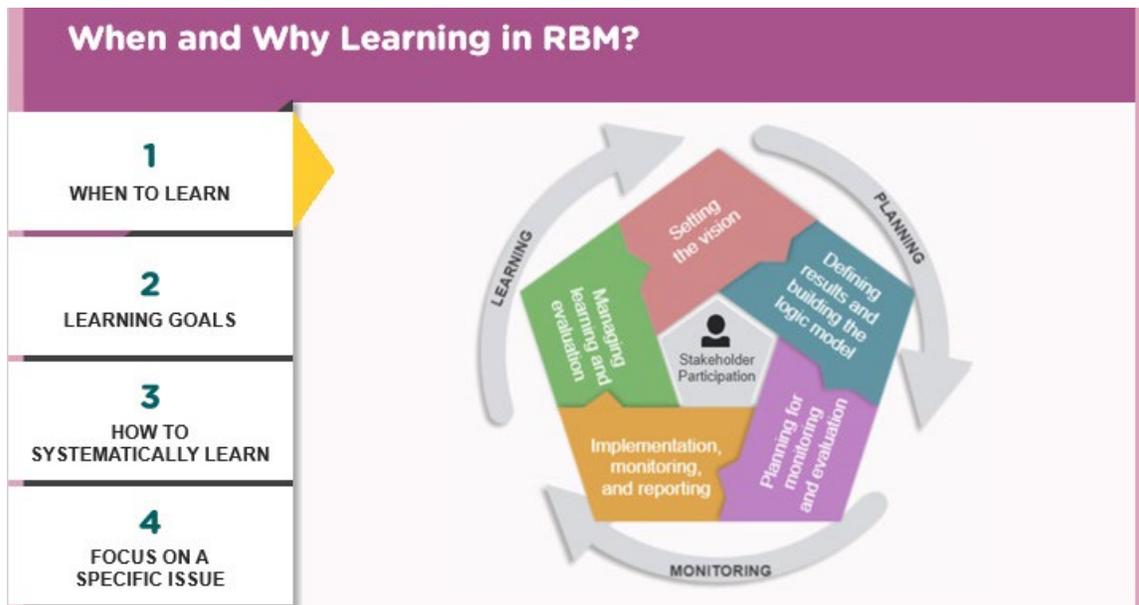
When and Why Learning in RBM?

When to Learn:

If a systematic approach to learning is not integrated into the project cycle, the key people involved may wait until the end of a project to thoroughly assess how things have gone and try to learn from the experience.

Integrating learning across the project cycle allows you to **adjust your approach** before the end of a project and be **more efficient, flexible** and **adaptable to implementation realities**.

Monitoring data is wasted unless it is shared, analyzed, and used to inform implementation and planning. But you have to make a plan in order to learn from the data you collected.



Learning Goals:

To systematically learn from implementation evidence, you need to create effective and appropriate goal-oriented “learning moments”.

During these “learning moments”, your team could be:

- Seeking solutions to known challenges or problems
- Exploring assumptions
- Testing and revising your program logic and theory of change
- Coming up with new activities or approaches
- And expanding knowledge related to your area of work

How to Systematically Learn:

Learning can be supported in many ways. For example:

- **Learning questions** can be included in the PMF or in reporting templates
- Time for reflection and learning can be included in **regular meetings, workshops** and **feedback sessions**
- Special learning meetings or learning reviews can be held on a regular basis.





Focus on a Specific Issue:

When we integrate learning moments into the project cycle, we can use the learning opportunity to **explore a particular issue**, or on a particularly successful or unexpected result. For example, you might reflect on what you can learn from your project about responding to issues of gender, diversity, and inclusion.

By focusing on a single issue, lessons learned can contribute significantly to your desired results. If dedicated time is set aside for it, learning can maintain its critical place among the many demands of project management.

Learning Reviews

Definition:

Learning reviews are meetings during which monitoring data is examined and factors affecting progress towards results are discussed.

It may just involve the project team, but a more participatory approach can include other stakeholders such as community members as well.

Learning reviews go beyond the usual content of regular weekly or ad hoc team meetings by inviting systematic reflection on how activities and experiences relate to the project results framework. They offer a chance for everyone to engage directly with monitoring data.

The frequency of reviews depends on team schedules and other considerations, but **quarterly reviews** can be a useful reminder of team members' monitoring responsibilities and ensure regular opportunities to check overall project health.

Learning Reviews	
1 DESCRIPTION	 Learning review meetings involve: <ul style="list-style-type: none">Project teamsStakeholdersCommunity members
2 PURPOSE	
3 KEY QUESTIONS	 Learning review meetings invite: <ul style="list-style-type: none">Systematic reflectionInclusive engagement with monitoring data
4 LEARNING REVIEW REPORT	
5 EXAMPLES	 Learning review meetings can happen: <ul style="list-style-type: none">Whenever it suits the teamIdeally, quarterly





Purpose:

The purpose of a learning review is to identify bottlenecks, challenges, successes, or unexpected developments encountered in carrying out planned activities with a view to gaining a better understanding of the project and its context.

The findings from a learning review form the basis for making any course corrections or adaptations that might be needed to address problems or build on opportunities.

Learning Reviews

1	DESCRIPTION
2	PURPOSE
3	KEY QUESTIONS
4	LEARNING REVIEW REPORT
5	EXAMPLES

The purpose of a learning review is to identify bottlenecks, challenges, successes, or unexpected developments encountered in carrying out planned activities with a view to gaining a better understanding of the project and its context.

Key Questions:

Questions that could be considered during a learning review meeting include:

Learning Reviews

1	DESCRIPTION
2	PURPOSE
3	KEY QUESTIONS
4	LEARNING REVIEW REPORT
5	EXAMPLES

Key questions

- What should we have achieved (in the project) by now?
- What information have we gathered over the last period through our monitoring processes, how, and from whom?
- What's working well, and why?
- What problems or challenges are there, and why?
- Can these problems or challenges be solved?
- What have we learned about matters such as: the institutional, cultural, and other contexts where we are carrying out our activities, the program sector or approach (community participation, gender equality, water and sanitation, health services, etc.), success factors, or the monitoring process itself?

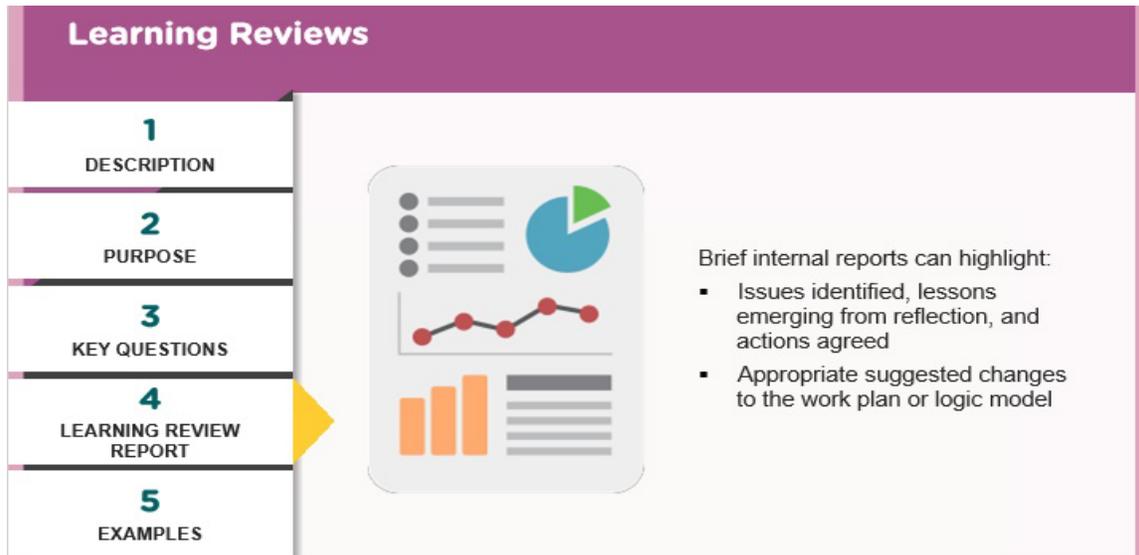
- After discussing some of these or other relevant questions, it will be time to ask the following: What action should we take to address points raised in the review?
- Who will take the action, and when?





Learning Review Report:

Following the review, a **brief report** could be circulated to the whole team, highlighting issues identified, lessons emerging from reflection, and actions agreed. If the review raises issues that are substantive enough to require changes to the work plan or logic model, these can be noted for inclusion in the next semi-annual or annual report so that appropriate changes to the plan and, if needed, the results framework and PMF, can be approved and implemented.



Examples:

Peace & Play tracks the following outcome indicator twice a year:

- Number of children who have spent time using the play space within the last six months, by gender, age, and island of residence.

 Their target is 1,000 children in each 6-month period, with an even distribution across categories.

 After the first year, the project team notices:

- A far larger percentage of girls are spending time in the play space compared to other genders.
- One island is heavily underrepresented.



During a learning review, they discuss this and consider various factors that might be responsible.

They come up with a plan to address the issue, which includes **new activities to promote the play space** in different ways and places.

They agree to check again in six months to see whether the implementation of these new ideas is having an effect.

The **Water and Sanitation Project** tracks the following output indicator quarterly, after every workshop:

Percentage of trainees able to identify 7 of 10 key concepts related to facility maintenance three months after training, disaggregated by gender, age, zone of residence, and other relevant categories.

 Their target is that 75% of all trainees can identify 7 of 10 key concepts.

 Their first two post workshop surveys met the target, but the next two found that fewer than 50% could do so. This coincided with a change in staffing as well as a change in the location where the workshops were being held.



During the learning review, the project team discusses whether either or both of these changes might be responsible for the decline in performance on this indicator, and they consider how to address it.



Summary and Notes

In this final quest, thanks to Prami and Kroja, who know how much systematic learning activities can benefit a project, you saw how Peace & Play used the data they had gathered to adjust activities to improve their outputs and, in turn, outcomes and impacts.

How can what you've learned through this quest benefit **you**? What learning activities will you implement in your project?



Additional Resources

[Spur Change's RBM 101 Practising Results-Based Management: An Introductory Course](#)

[Results-Based Management Handbook : Working Together for Children](#)

[Results-Based Management for International Assistance Programming at Global Affairs Canada: A How-to Guide](#)

[Results-Based Management Website Page](#)

[Baseline Survey Training](#)

[Data Collection Training](#)

[Peace & Play Theory of Change](#)

[Peace & Play PMF \(excerpt\)](#)

[Agroforestry PMF](#)

[Indicators Checklists](#)

[Baseline Data, Targets, Data Sources and Data Collection Checklists](#)

[Logic Model Terminology Equivalents](#)

Final Evaluation Answer Sheet

QUESTION ABOUT MODULE 1: PLANNING STRATEGICALLY & TAKING A PARTICIPATORY APPROACH

Question 1

What is a theory of change?

- A theory of change is a representation of why and how a project or program is expected to lead to the desired results.
- A theory of change is a representation of how a project or program is expected to lead to the desired results.
- A theory of change is an approach to managing change within an organization.
- A theory of change describes an understanding of the overall strategic framework of the project or program (the big picture).
- A theory of change is a set of guidelines for how to make changes in program plans and activities.
- A theory of change can take many forms.

Question 2

What is important to do when an organization starts a project?

- Brainstorm activities
- Consult with stakeholders involved in the project
- Select a project manager

QUESTIONS ABOUT MODULE 2: ORGANIZING THE DESIRED RESULTS INTO A LOGIC MODEL

Question 3

What are results?

- Results are observable and describable changes.
- Results can be measured.
- Results are changes that can be attributed to an identified cause-and-effect relationship.
- Results are indicators signalling how well an activity is doing.
- Results can only be positive and predictable.

Question 4

Results can relate to changes in:

- State
- Situation
- Behaviour
- Attitude
- Function
- Capacity
- Practice

Question 5

A result statement typically starts with...

- increased
- approved
- decreased
- improved
- enhanced
- controlled
- on target
- reduced
- strengthened

Question 6

Can an indicator include a target?

- Yes, always
- No, never
- Sometimes, depending on the context
- I don't know

Question 7

A result statement describes who is affected by a change and where.

- True
- False
- I don't know

Question 8

In RBM, what are the main levels of results identified in the logic model, from highest level to lowest?

- Impacts, outcomes, and outputs
- Outcomes, impacts, and outputs
- Outputs, outcomes and impacts
- Ultimate outcomes, intermediate outcomes, immediate outcomes, and outputs

Question 9

Match each definition with the corresponding level in the logic model.

- Impacts** = The high-level, longer-term change(s) that an intervention works toward.
Outcomes = The intended short-term and medium-term effects of an intervention.
Outputs: The immediate results of a completed project or program activity/activities.

Question 10

When should gender equality, inclusion, and other cross-cutting issues be considered in the RBM project cycle?

- At the very beginning, when defining the theory of change and logic model.
- When defining the indicators.
- After implementing the activities.
- At every stage of the project cycle.

Question 11

What are key elements to consider while integrating gender equality and inclusivity in your project cycle?

- The social roles of people with diverse and intersecting identities.
- Discriminatory social norms and stereotypes.
- Differences in people's access to resources and benefits.
- Differences in access to and influence over decision making.
- The different ways diverse people and groups are treated by laws, policies, and institutions.
- Differing needs, priorities, and circumstances of different groups and individuals.

Question 12

What is a logic model in RBM?

- A management tool.
- A tool used to facilitate the planning of a development intervention.
- A tool used to facilitate the execution of a development intervention.
- A tool used to facilitate the evaluation of a development intervention.
- A tool used to facilitate the learning activities based on a development intervention.
- A tool used to facilitate the monitoring and reporting of data associated with an intervention.

Question 13

To build a logic model, what do you start with?

- The long-term impact you want your project to advance or contribute to
- The activities you w
- The resources your project has at its disposal

Question 14

How do you test the causal relationship between the levels of a logic model?

- Using the "IF/THEN" test.
- Using the "WHY/HOW" test.
- Using the performance measurement framework (PMF) tool.
- Using monitoring data.

QUESTIONS ON MODULE 3: MONITORING FOR RESULTS

Question 15

What is monitoring in RBM and what purpose does it serve?

- It's an ongoing process of collecting information to measure progress.
- It lets us know whether we are doing what we planned.
- It lets us know how well we are using resources such as time and money.
- It helps us figure out what works and what does not, so we can adjust our activities and plans.
- It's a process of reflecting deeply on project results and the processes used to achieve them.

Question 16

What purpose do indicators serve in RBM?

- They help measure progress over time.
- They provide evidence that a result has been achieved or is progressing towards achievement.
- They are a means of measuring actual results against planned results in terms of quality, quantity and timeliness.
- They are like "signals" that help measure results and reveal progress of specific objectives.

Question 17

What type of indicators measure the "number of, frequency of, percentage of, ratio of, variance with, median of, mode of, and average of"?

- Quantitative indicators
- Qualitative indicators
- Progress indicators
- Ratio indicators

Question 18

What type of indicators measure the "congruence with, existence of, type of, quality of, extent of, level of, and degree to which"?

- Quantitative indicators
- Qualitative indicators
- Progress indicators
- Ratio indicators

Question 19

Breaking down an indicator according to a significant category or characteristic, such as gender, income level, disability, geography/location, age, ethnicity, or other variables is called...

- benchmarking
- disaggregation
- disintegration
- segregation

Question 20

At what levels are indicators defined?

- Indicators are defined at each results level: impact, outcome, and
- Indicators are defined at the impact and outcome levels.
- Indicators are defined at the impact level only.
- Indicators are defined at the outcome level only.

Question 21

What columns would you find in a performance measurement framework (PMF)?

- Expected Results
- Indicators
- Baselines
- Analysis
- Targets
- Data Sources
- Data Collection Methods
- Frequency
- Responsibility

QUESTIONS ON MODULE 4: REPORTING

Question 22

What does a good results-based report contain?

- Progress towards achieving results.
- Change that has occurred because of the interventions implemented.
- A demonstration of the link between activities and actual results, on each level of the logic model, using indicators.
- Challenges faced.
- Proposed solutions or mitigating strategies.

QUESTIONS ON MODULE 5: LEARNING

Question 23

What are the **main** objectives of learning activities within the context of an RBM approach?

Select all the correct answers and click on **SUBMIT**.

- Making adjustments before the end of a project to make it more efficient, effective, and appropriate to implementation realities.
- Sharing, analyzing, and using the collected data to inform implementation and planning.
- Improving performance in the most effective and appropriate ways.
- Providing training to project team members on monitoring and evaluation.
- Informing donors and other partners about progress made by a project.

Question 24

What is the purpose of RBM?

- It is a management approach designed to improve project and program design, implementation, monitoring, learning, reporting, and accountability in any project or program in any sector or sphere.
- It is a management approach designed to link project results to project costs.
- It is an accountability system designed to keep stakeholders informed of project progress in real time.

