### General Information

#### Course

- **Title**: Monitoring and evaluating development projects and programs
- **Course #**: INTD 397
- **Term**: Fall
- **Year**: 2019
- **Pre-requisite**: INTD 200
- **Schedule**: Mondays and Wednesdays 11h35 to 12h55
- **Location**: ENGTR 1100
- **Number of credits**: 3

#### Instructor

- **Name**: Kattie Lussier
- **Email**: kattie.lussier@mcgill.ca
- **Office location**: Room 240 Peterson Hall, 3460 McTavish street
- **Office hours**: Mondays and Wednesdays 14h00 to 16h00
  
  Appointments needed for meetings outside of office hours

#### Teaching assistant

- **Name**
- **Email**
- **Office hours**

#### Course overview

**Synopsis**

UNDP (2009:8) defines monitoring as the “ongoing process by which stakeholders obtain regular feedback on the progress being made towards achieving their goals and objectives”. An evaluation is “a rigorous and independent assessment of either completed or ongoing activities to determine the extent to which they are achieving stated objectives and contributing to decision making” (ibid). Both can be conducted to look at many things, including an activity, a project, a program, a strategy or even a policy. Monitoring and evaluation (M&E) systems are therefore important to provide the information that the various people concerned by a development intervention need for accountability, management and learning purposes.
In this course, students will learn about the different ways that development actors can assess their interventions and follow up on the different activities of a project or program in order to become aware of its short comings and successes and to identify the extent to which development operations are achieving the results that they seek to produce.

The first part of the course will discuss the importance of monitoring and evaluation, its place within the project cycle and how different stakeholders relate to the process. It will also look at the various elements that must be considered during the project design in order to put the system in place, such as the theories of change that underpin development interventions, logical models and frameworks. The second part of the course will look at the main components of a monitoring, evaluation, accountability and learning system as well as different strategies and tools of data collection and their relevance to baseline studies, monitoring, end of project evaluations and impact assessments. The third part of the course will focus on making sense of, using and communicating the information gathered through monitoring and evaluation.

Considering the diversity of practices amongst development organizations, both indicator-based and outcome-oriented approaches to monitoring will be presented, but more emphasis will be given to those that are aligned with major donors’ requirements.

**Course’s Contribution**

A monitoring and evaluation system is an essential element of the results-based management approach that a majority of development organizations is now using. This course will therefore be particularly helpful to students who aim at working within an implementation body such as an NGO or a multilateral project office. It will also provide useful knowledge to those seeking to work in a managerial position for a funding agency or in a policy making role that involves the use of project’s data for accountability and decision-making purposes.

**Instructional methods**

The course will use a mix of methods including lectures, plenary sessions, small group practical exercises (practicum) and discussions. The material used during the lectures will be uploaded to myCourses weekly. Other important information and material will also be shared through myCourses. Students should therefore consult it regularly. Polling@McGill will be used for formative purposes only. Students are encouraged to download the application (see [https://mcgill.ca/polling/](https://mcgill.ca/polling/) for further information) but the answers they will provide through the app will not be part of the evaluation.

**Organization**

Mondays will be dedicated to lectures and from week three onward, with the exception of mid-term week, Wednesdays will be dedicated to practicum and discussions. Attendance to these classes is mandatory in order not to penalise other team members by delaying their work.
Lectures  
Students are expected to do their readings before each class and, from times to times, will be requested to watch short videos online before class. Students are strongly encouraged to participate in the lectures by sharing their ideas and experiences and by asking questions.

Practicum  
Practicum will be conducted in small groups and serve as a model for the final assignment. With the exception of the simulation of outcome mapping, the groups will remain the same. Each team will select an example of development project and use it for the entire course. This is to be able to build on the work from previous weeks and avoid wasting time on thinking about and selecting a new project each time.

There will be five practical group assignments. Three of them will take two lessons to complete. Teams that will not manage to complete their work during the practicum sessions will be requested finish it on their own time.

The group assignments are as follow
- Outline of a theory of change (5%)
- Logframe part 1 (5%)
  part 2 (5%)
- M&E planning (5%)
- Simulation of outcome mapping (5%)
- Interpretation of M&E data (5%)

Learning

Aim

The course aims to familiarize students with monitoring and evaluation systems (M&E or MEAL), their various components and their uses.

Objectives

At the end of the course, students are expected to be able to
- discuss the role and importance of a M&E system;
- discuss the place of accountability and learning in project management;
- identify the main components of a M&E system;
- explain the role of logic models;
- discuss the advantages and limitations of logical frameworks;
- list the characteristics of a good indicator;
- select appropriate data collection tools;
- identify M&E stakeholders and the role they should play in the process;

Competencies

- Develop a simple theory of change for a development intervention
- Prepare a logical framework
- Plan a simple M&E system
- Make sense of monitoring and evaluation information to formulate recommendations
Soft skills

- Teamwork
- Reflective skills
- Inference making

Evaluation

Means of evaluation and ponderation

<table>
<thead>
<tr>
<th>Evaluation criteria</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practicum</td>
<td>30%</td>
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<tr>
<td>Mid-term exam</td>
<td>30%</td>
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<tr>
<td>Take home examination in the form of a final assignment</td>
<td>40%</td>
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</table>

Evaluation criteria for practicum

<table>
<thead>
<tr>
<th>Information criterion</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information is complete</td>
<td>2</td>
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<tr>
<td>Information is relevant</td>
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<tr>
<td>Information is clear</td>
<td>1</td>
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Information on the final assignment

For their final assignment, students will select a development project in a sector of activity and a country of their choice and plan a monitoring and evaluation strategy for that project. The M&E strategy should include a brief description of the project and its context, the stakeholders, the desired outcomes, the means of assessment and the description of the process. The strategy should not exceed 10 pages including all tables and references. Students are strongly encouraged to begin working on their final assignment early and to use the feedback provided on practicum to improve their individual work.

More details on the assignment will be provided in class and the evaluation grid will be available on myCourses.

Final assignments should be uploaded to Minerva by 12h55 on Tuesday December 3rd.

Late assignments will be penalized for each day of delay. In cases of force majeure, students should contact the instructor as soon as possible to discuss the possibility of an extension.

Course Schedule

<table>
<thead>
<tr>
<th>Dates</th>
<th>Topics covered</th>
<th>Activities</th>
<th>To do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Introduction to M&amp;E</td>
<td>Lecture</td>
<td>Look at syllabus</td>
</tr>
<tr>
<td>Sept 4</td>
<td>Presentation of syllabus</td>
<td>Discussions</td>
<td>Read resources 1</td>
</tr>
<tr>
<td></td>
<td>Terminology</td>
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<tr>
<td></td>
<td>Role of M&amp;E in project management</td>
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<tr>
<td>Week 2</td>
<td>The logic of a project or program</td>
<td>Lecture</td>
<td>Look at examples</td>
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<tr>
<td>Sept 9</td>
<td>M&amp;E and the project cycle</td>
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<td></td>
<td>Distinction between M&amp;E, evaluation</td>
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<td></td>
<td>and impact evaluation</td>
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<td></td>
<td>Evidence chain</td>
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<tr>
<td></td>
<td>Role of logic models</td>
<td></td>
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</tr>
<tr>
<td>Sept 11</td>
<td>Result frameworks</td>
<td>Lecture</td>
<td>Read resources 2</td>
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<tr>
<td>Week 3</td>
<td>Planning a process of change</td>
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<tr>
<td>Sept 16</td>
<td>Stakeholders’ analysis Inclusion, inequalities and power dynamics Projects’ theories of change</td>
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<tr>
<td>Lecture</td>
<td>Look at examples of ToC</td>
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<tr>
<td>Sept 18</td>
<td>Developing a theory of change Practicum 1</td>
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<tr>
<td>Week 4</td>
<td>Logical frameworks</td>
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<tr>
<td>Sept 23</td>
<td>Vertical and horizontal logic Components</td>
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<tr>
<td>Lecture</td>
<td>Work on P1</td>
<td></td>
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<tr>
<td>Sept 25</td>
<td>Expand the theory of change Practicum 1 Submit P1 Read resources 4</td>
<td></td>
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<table>
<thead>
<tr>
<th>Week 5</th>
<th>Selecting indicators</th>
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<tbody>
<tr>
<td>Sept 30</td>
<td>Types of indicators Characteristics of a good indicator Factors to consider Wording of indicators</td>
</tr>
<tr>
<td>Lecture</td>
<td>Look at examples of logframes and indicator banks</td>
</tr>
<tr>
<td>Oct 2</td>
<td>Building a logframe Practicum 2 Work on P2</td>
</tr>
<tr>
<td>Week 6</td>
<td>Synthesis of M&amp;E within a project cycle</td>
</tr>
<tr>
<td>Oct 7</td>
<td>Revision Lecture</td>
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<tr>
<td>Oct 9</td>
<td>Refine and improve the logframe Practicum 2 Submit P2</td>
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<thead>
<tr>
<th>Week 7</th>
<th>Mid-term</th>
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<tbody>
<tr>
<td>Oct 14</td>
<td>Thanksgiving No class</td>
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<tr>
<td>Oct 16</td>
<td>Mid-term exam Exam Read resources 5</td>
</tr>
<tr>
<td>Week 8</td>
<td>Planning for M&amp;E</td>
</tr>
<tr>
<td>Oct 21</td>
<td>Factors to consider Planning tools Process and tasks Sampling Data management</td>
</tr>
<tr>
<td>Lecture</td>
<td>Watch videos</td>
</tr>
<tr>
<td>Oct 23</td>
<td>M&amp;E plan Practicum 3</td>
</tr>
<tr>
<td>Week 9</td>
<td>Data collection methods</td>
</tr>
<tr>
<td>Oct 28</td>
<td>Advantages and limitations of traditional and participatory methods Inclusion and diversity Data quality Positionality and Ethics</td>
</tr>
<tr>
<td>Lecture</td>
<td>Work on P3</td>
</tr>
<tr>
<td>Oct 30</td>
<td>Refine and improve the M&amp;E plan Practicum 3 Submit P3 Read resources 7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 10</th>
<th>Outcome oriented approaches to M&amp;E</th>
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<tbody>
<tr>
<td>Nov 4</td>
<td>Strengths and weaknesses Outcome mapping Most significant change</td>
</tr>
<tr>
<td>Lecture</td>
<td>Look at OM resources</td>
</tr>
<tr>
<td>Nov 6</td>
<td>Simulation of outcome mapping</td>
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<tr>
<td>Practicum 4</td>
<td>Submit P4 Read resources 8</td>
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</table>

<table>
<thead>
<tr>
<th>Week 11</th>
<th>Making sense of M&amp;E data</th>
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<tbody>
<tr>
<td>Nov 11</td>
<td>Importance of baseline Pros and cons of control groups Analyzing M&amp;E data</td>
</tr>
<tr>
<td>Lecture</td>
<td>Look at examples of M&amp;E data</td>
</tr>
<tr>
<td>Nov 13</td>
<td>Making sense of qualitative and participatory M&amp;E data Differences between monitoring and evaluation findings</td>
</tr>
<tr>
<td>Discussion</td>
<td>Read resources 9</td>
</tr>
</tbody>
</table>
Week 12  Using M&E findings
Nov 18  Making inferences from M&E data
        Learning and accountability
        Different types of evaluations  Lecture  Review P5 data
Nov 20  Interpretation of M&E data  Practicum 5  Submit P5
        Read resources 10

Week 13  Communicating M&E findings
Nov 25  Data visualization
        Reporting
        Formulating recommendations  Lecture  Look at examples
Nov 27  Decision making in complex
        environments  Discussion  Work on final
        assignment

Week 14  Synthesis
Dec 2  Critical reflections on M&E
        Emerging evaluation perspectives  Lecture  Work on final
        assignment
Dec 3  Synthesis of the course  Discussion
        Q&A session  Submit final
        assignment

Course Materials

All course materials will be available on myCourses or from McGill’s online library. There is no textbook to purchase for this course.

Key References


Other Resources

(McGill Ebook: [https://mcgill.on.worldcat.org/oclc/55894425](https://mcgill.on.worldcat.org/oclc/55894425))
(McGill Ebook: [https://mcgill.on.worldcat.org/oclc/501181447](https://mcgill.on.worldcat.org/oclc/501181447))
(McGill Ebook: [https://mcgill.on.worldcat.org/oclc/792685564](https://mcgill.on.worldcat.org/oclc/792685564))

Useful Websites

- M&E Universe: https://www.intrac.org/resources/me-universe/
- Outcome Mapping Learning Community: https://www.outcomemapping.ca
- BetterEvaluation: https://www.betterevaluation.org
- Tools4dev: http://www.tools4dev.org/
- Results based management: https://www.rbmtraining.com/rbm-websites.html
- Monitoring and Evaluation News: https://mande.co.uk/

Weekly Readings

Resources 1


Resources 2


Resources 3


Resources 4


Resources 5

Resources 6


Also suggested: Not mandatory
Resources 7


Resources 8


Resources 9


Resources 10


Also suggested (not mandatory)

Institutional Policies

**Academic Integrity / Plagiarism**

McGill University values academic integrity. Therefore, all students must understand the meaning and consequences of cheating, plagiarism and other academic offences under the Code of Student Conduct and Disciplinary Procedures (see [www.mcgill.ca/students/srr/honest/](http://www.mcgill.ca/students/srr/honest/) for more information).

Note that to support academic integrity, your assignments may be submitted to text-matching or other appropriate software (e.g., formula-, equation-, and graph-matching).

Language of Submission

In accord with McGill University’s Charter of Students’ Rights, students in this course have the right to submit in English or in French any written work that is to be graded. This does not apply to courses in which acquiring proficiency in a language is one of the objectives.

Conformément à la Charte des droits de l’étudiant de l’Université McGill, chaque étudiant a le droit de soumettre en français ou en anglais tout travail écrit devant être noté (sauf dans le cas des cours dont l’un des objets est la maîtrise d’une langue).

Course Evaluation

End-of-course evaluations are one of the ways that McGill works towards maintaining and improving the quality of courses and the student’s learning experience. You will be notified by e-mail when the evaluations are available on Mercury, the online course evaluation system. Please note that a minimum number of responses must be received for results to be available to students.

Special needs

As the instructor of this course I endeavor to provide an inclusive learning environment. However, if you experience barriers to learning in this course, do not hesitate to discuss them with me and the Office for Students with Disabilities, 514-398-6009.

If you have a hearing, visual and mobility impairment, please contact me immediately (in advance of any evaluations or other class requirements).

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1 The content below comes from McGill’s Course outline guide, 2019
Other policies

Additional policies governing academic issues which affect students can be found in the McGill Charter of Students' Rights (see document).

McGill has policies on sustainability, paper use and other initiatives to promote a culture of sustainability at McGill. (See the Office of Sustainability.)

*Nota Bene*

In the event of extraordinary circumstances beyond the University’s control, the content and/or evaluation scheme in this course is subject to change.

Acknowledgement

McGill University is on land which has long served as a site of meeting and exchange amongst Indigenous peoples, including the Haudenosaunee and Anishinabeg nations. We acknowledge and thank the diverse Indigenous people whose footsteps have marked this territory on which peoples of the world now gather.

L’Université McGill est sur un emplacement qui a longtemps servi de lieu de rencontre et d’échange entre les peuples autochtones, y compris les nations Haudenosaunee et Anishinabeg. Nous reconnaissons et remercions les divers peuples autochtones dont les pas ont marqué ce territoire sur lequel les peuples du monde entier se réunissent maintenant.