



## DATA GUIDES

### MONITORING & EVALUATION PLANNING GUIDE

# Monitoring & Evaluation Planning Templates



Without Monitoring & Evaluation (M&E), you can't know where to strategically make change and maximize the efficiency of your inputs. These templates support your campus team's work as you develop your Monitoring and Evaluation Plan.

## Step 1. Where Do We Start?

To begin, respond to the following questions. Your **Metrics and Activities Maps** and **Targets** can help you to respond to these questions. *Enter your responses below.*

1. What is the problem the strategy is attempting to address?

2. What are the activities undertaken to address the problem?

3. How will you know when you are successful?

4. Is the assessment goal to measure progress toward a target and/or to identify impact and promising practices?

As you develop your plan, be sure to consider:

1. **What do we want to learn?** What are you trying to answer or achieve with the assessment?
2. **What else is going on?** Understand the influences of policies and strategies and the structures that affect implementation. Also consider other assessments that will be conducted at the same time which may either support or conflict with your assessment, or limit the capacity of those involved.
3. **What resources do we have?** Consider the available resources, both financial and human, and the amount of time needed for an effective assessment.
4. **Who are the stakeholders?** Consider all appropriate stakeholders -- internal and external -- and decide how to involve them during assessment design, implementation, analysis, reporting and communications. What are their various assessment information needs?
5. **Be flexible!** Programs and strategies change during their life cycles; a relevant and effective monitoring and evaluation plan needs to as well.

## Step 2. Define Indicators

**"What gets measured gets improved."**

— PETER DRUCKER

Indicators should be:

- **Student-centric:** What is the related student outcome or behavior you wish to see?
- **Measurable:** How can you measure it?
- **Actionable:** What action can you take from the resulting data?
- **Aligned with strategy:** Do the indicators support strategic decisions?



INDICATOR TYPE	INDICATORS
<b>Process.</b>	<ul style="list-style-type: none"> <li>■ Support both monitoring or evaluation.</li> <li>■ Are activities being implemented as planned?</li> <li>■ Example: Number of faculty participating in and completing online teaching training.</li> </ul>
<b>Output.</b>	<ul style="list-style-type: none"> <li>■ Support both monitoring or evaluation.</li> <li>■ Are students, faculty, and staff participating in the studied activities?</li> <li>■ Example: Percent of students enrolling in support services; percent of faculty training for newly implemented support services.</li> </ul>
<b>Outcomes.</b>	<ul style="list-style-type: none"> <li>■ Are student success rates improving? Has the strategy had the desired impact?</li> <li>■ Support both monitoring or evaluation.</li> <li>■ Example: Percent of students passing online courses taught by faculty who have successfully completed the online teaching training.</li> </ul>
<b>Lessons Learned.</b>	<ul style="list-style-type: none"> <li>■ Supports evaluation.</li> <li>■ How do strategies increase student success rates? What are promising practices for implementation and replication?</li> <li>■ Example: Increase meaningful engagement with students which will also increase instructor satisfaction with online teaching.</li> </ul>



# Step 3. Define Data Collection Methods, Schedule, Roles & Responsibilities

For each of the indicators identified in Step 2, identify the data source and availability, frequency of collection, and the responsible party.

Don't forget qualitative data sources!

Discuss what data needs to be monitored and evaluated with all stakeholders.

Indicators should be objective, verifiable, consistently defined and operationalized, and easily understood.

INDICATOR	DATA SOURCE	AVAILABILITY	FREQUENCY COLLECTED	DATA MANAGER
Example: Number of faculty participating in and completing online teaching training.	Training schedules and attendance logs; faculty training certificates	Monthly	Quarterly	Project Team



INDICATOR	DATA SOURCE	AVAILABILITY	FREQUENCY COLLECTED	DATA MANAGER





## Step 4. Create an Analysis and Reporting Plan

Once the data are collected, include plans for how to compile, analyze, and report the data, as well as who is responsible to do so. The analysis and reporting plan contain specifics about any computations, methodologies, statistical tests, along with templates for presentation.

INDICATOR	DEFINITION	COMPUTATION	ANALYSIS	SIGNIFICANCE TESTING	REPORT	ANALYST	METHODOLOGICAL NOTES
<i>Example: Number of faculty participating in and completing online teaching training.</i>	<i>Receipt of certificate upon completion of training.</i>	<i>Count number of faculty completing</i>	<i>Descriptive: Sum</i>	<i>N/A</i>	<ul style="list-style-type: none"><li>■ # of faculty completing</li><li>■ % of targeted # of faculty completing</li></ul>	<i>Proj. Team</i>	



INDICATOR	DEFINITION	COMPUTATION	ANALYSIS	SIGNIFICANCE TESTING	REPORT	ANALYST	METHODOLOGICAL NOTES

Monitoring plans include targets and illustrate progress toward the target. A simple illustration follows. Consider graphical displays to best illustrate progress toward targets. See the sample reporting template below.

INDICATOR	BASELINE	TIME PERIOD 1	TARGET	% TARGET ACHIEVED
Example: Number of faculty participating in and completing online teaching training.	0	30	150	20%



An evaluation plan using quantitative data may include outcomes comparisons of the treatment and the non-treatment groups, or on pre/post-treatment measures. Qualitative data to support an evaluation plan may result in themes identified via focus group findings, for example, exploring learning acquisition from the faculty training, why some faculty did not participate in training, or the value seen in the training. An example of a quantitative display is below.

Develop a baseline, and if possible, a control group, at the beginning.

If it is not possible to collect baseline at the beginning, consider a retrospective collection. For qualitative data, perspective, ask students to compare a situation before and after.

INDICATOR	BASELINE	POST-INTERVENTION	% CHANGE	COMPARISON GROUP	% DIFFERENCE, TREATMENT & COMPARISON GROUP
Example: Number of faculty participating in and completing online teaching training.	10	30	200%	25	17%





## Step 5. Dissemination & Communication

Don't keep it a secret! All stakeholders need monitoring and evaluation information so they can act.

The process is only successful once the information and lessons are put to use!

### SAMPLE REPORTING & COMMUNICATIONS PLAN

STAFF	COMMUNICATION	GOALS	SCHEDULE	FORMAT	RESPONSIBILITY
<i>Example: Strategy Lead &amp; Team</i>	Dashboard and metric reports	<i>Continually and regularly monitor progress so that adjustments can be made real-time.</i>	<i>Upon new release of each metric</i>	<i>In-house interactive tableau dashboard</i>	<i>IT/IR</i>
	Programmatic student and course data	Continually and regularly monitor progress and support faculty and staff involved in the strategy.	2 times per term	Static report from SIS	IT/IR
	Interim and final evaluation reports	Support strategy-level decision making regarding programs and policies.	Interim reports: end of term; Final report: end of evaluation period	"Interim: briefing & memo  Final: formal report, presentation of recommendations"	Evaluation team

[illegible]