

Using Monitoring Data to Make Projects More Effective

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This brief guide will help you navigate quarterly reporting and keep the focus on data that is useful for project management. As you conclude your review of indicator results and narrative responses, please pause to consider larger questions of quality and impact that are detailed below prior to approving or returning submitted data.

1. Understand the project plan

Before considering individual indicators, ensure you understand the overall project design. What are the expected results of the project, and what are the activities that should create each of those results? Mapping out the project design (see Figure 1) can be helpful.

Once you have a map of the design, read the quarterly report narratives to see which activities were conducted in the previous quarter – that is, where you are on the map of the design.

- Sometimes, the activities being implemented are not even on the map! If so, forget about the indicators, and work with the implementing partner to revise the project design to account for what they are actually doing.
- If the reported activities have a place on the map, then you know where you are in the implementation plan. The next step is to understand how the indicators fit with the project design.

Actions: Map the project design to understand it as a whole and determine which parts are being actively implemented.

2. Understand the monitoring plan

After you have created a map of the project design and verified where project implementation is currently at (i.e., which activities are underway), the next step is to add the indicators to your map. The Change Map is very helpful for this exercise. If your project does not have one, work with the implementing partner to understand how the indicators map to the activities and results. Add the indicators to your project design map, (see Figure 2). Check that the indicator is useful by asking: Does this indicator tell me to what extent the associated activity, objective, or goal has been achieved?

- Sometimes, an indicator does not tell you whether the associated design element has been achieved. This is an easy problem to fix. Verify with the implementing that the indicators do not map on to any project design element; if they don't, cut them from the monitoring plan or ignore them in your reviews – they are not useful.
- Sometimes you will find that key design elements (especially goals and objectives) do not have indicators. Not all design elements need an indicator, especially day-to-day activities of the implementing partner. But goals and objectives need at least one indicator each. Once you close the reporting period, work with the implementing partner to:
 - Ensure that goals and objectives meet the INL Change and Clarity standards. You must define results before you can measure them – so make sure they are well defined. While you can't change the goals or objectives in a project agreement, you can further refine them to articulate their meaning more clearly.

- Once the goals and objectives state specific expected results, work with the implementing partner to develop an indicator for each goal and objective that is missing one. Indicators must meet the Valid Indicator standard.

Actions: Add indicators to your map using a Change Map or workshop with the Partner, and ensure the indicators are useful. With the Partner, remove or ignore unnecessary indicators and add indicators for goals and objectives that do not have at least one indicator.

3. Review the data – with targets

You should only have to develop the project design and monitoring plan once. There may be revisions as time goes on, but you don't need to map out the design elements and indicators every quarter. A good map will allow you to quickly identify where you are in the project implementation plan and which indicators are most useful for the current stage of implementation. In other words, the map tells you where to focus your monitoring efforts.

From there, you can quickly review the quarterly data submission to check that all useful indicators have reported data, or a comment that explains why data were not reported.

You should also check whether the reported results are on track. For this, you need targets. If an indicator has a target set, DevResults will show you the percent of target achieved in the data review window. If an indicator does not have a target, work with the implementing partner to set one, then ask the DevResults team to input the target into the database.

Actions: Review quarterly submissions to verify data has been submitted for useful indicators, or a reason given if not. Compare indicator results to targets. If targets are missing, work with the partner to determine appropriate targets, and ask the DevResults team to input them.

4. Adjust project implementation where needed

With data, targets, and a map to help you identify where in the implementation plan you are, you can use monitoring data to adjust course when and where needed.

If certain aspects of project implementation or expected results aren't on track, it's always a good idea to have a conversation with the implementing partner to understand why. Are there problems implementing the activities? Are the activities implemented according to plan, but the expected results aren't happening? Why do they think the activities are having the expected results?

Useful monitoring data gives you the power to identify where things are and are not going well. With this information in hand, you can work with the implementing partner to understand what the causes of the problems are, and what can (or can't) be done to improve going forward.

Actions: Diagnose where results are off track, and revise activities or expected results accordingly.

FIGURE 1: Project Design Map

Note: Drawing a project design “map” requires only a pen and a blank sheet of paper – or a white board if you have one. Nothing fancy, nothing formal.

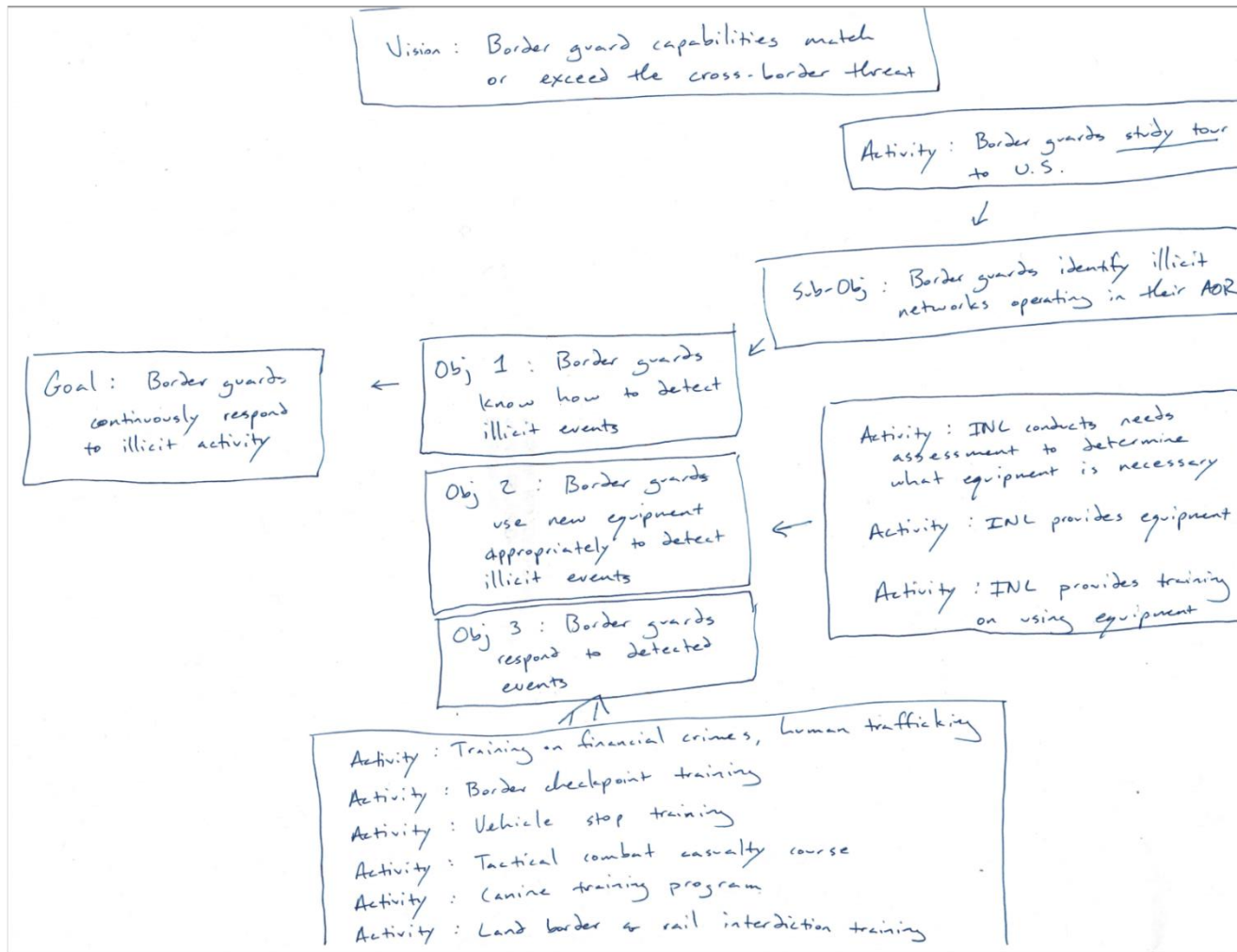


FIGURE 2: Project Design Map with Indicators

Note: When adding indicators to the map, you may want to start with just one chunk of the project (especially the part that is currently underway). As you have time, you can expand your efforts to sections of the project that will be implemented in the future.

