Meeting Highlights: Monitoring and Evaluation Community of Practice

Using participatory methodologies to enrich your data collection

16 May 2017

Setting the scene

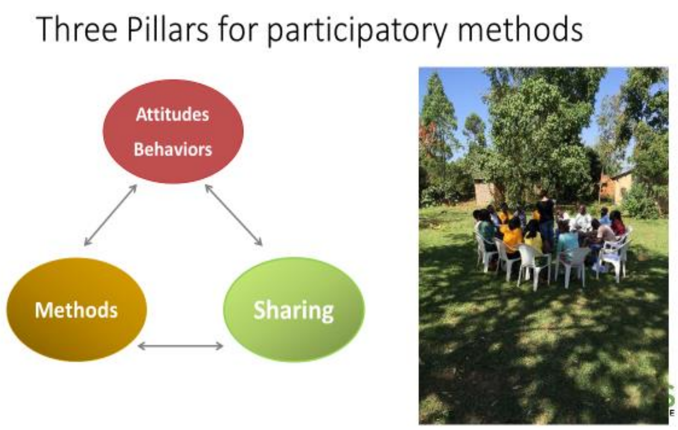
The second Monitoring and Evaluation community of practice meeting in 2017 focused on participatory methodologies for collecting project and evaluation data. Alyna Wyatt of Genesis Analytics led the group through a process-driven session in which the medium was the message: while she shared some content information on the methodology through her presentation, we also took part in activities which modelled different ways in which data could be drawn from target groups in different contexts.

An ice breaking activity: For our first activity we listed personal traits or skills on sticky notes, and then members of the group drew connections between these as an illustration of a participatory-style ice-breaker. Alyna explained how such an activity can (for example) help participants of a focus group get to know each other. Such an activity can also be used to collect various kinds of data, such as views on a particular topic, or as a triangulating tool for information such as demographics. The 'map' created can help illustrate trends and patterns, and show where deeper probing is needed.

Key features of participatory methods

- The facilitator brings his or her own experiences and insights into the process; it is essential that he or she is committed to open and flexible attitudes and behaviours, has good listening skills, and is able to keep a low profile. The facilitator is not the 'expert' and should be enabling collective learning rather than performing top-down lecturing.

- Methods such as visualization tools, ranking and scoring tools, trend analysis tools and calendar tools are useful to this approach, but not exclusive to other methods. Target audience participants themselves get involved in making and using the data collection tools, as context is a major factor.



To go to the presentation, click [here]

An example: If data is being collected in the context of the agricultural sector, a seasonal calendar would be a key tool. Seasonal factors would determine income, for example, and might affect issues such as health or school attendance. Evaluation participants could contribute to the evaluator's contextual understandings by populating a seasonal calendar with various activities and pressures.

Sharing from the ground up rather than from the programme plan down needs to be enabled: for example, in a financial intervention any institutions (such as banks or micro-lenders) need to share their knowledge and experiences with beneficiaries. The aim is to forge authentic partnerships. Participatory evaluators themselves buy into the concepts of adaptive evaluation and their own ongoing learning.

Some benefits	Some challenges
• Can be used to complement other data collection methods • Can elicit feelings and views that may not come out from other data collection methods • Can be adapted to context • Promotes a sense of ownership and collaboration, which may support post-programme sustainability • Supports adaptive management of a programme: the project can introduce changes along the way in response to qualitative data and project learnings • Richer than quantitative analysis	• This kind of data collection is sometimes side-lined as evaluation commissioners want quantitative and statistical data to 'prove impact'. Participatory evaluators sometimes have to convince the evaluation commissioners of the value of the kind of 'non-statistical' data elicited by participatory evaluation. • Participatory evaluation is time consuming, as it requires the building up of trust. • It also requires a specific skills set from the facilitator

Monitoring is the periodic / routine collection of data on project implementation (e.g. attendance numbers at a clinic, or at a Saturday afternoon lessons).

Evaluation is a planned intervention at a specific point in the project to collect evidence of its value, in relation to defined criteria.

Examples of CoP Workshop Activities

Activity 1: Sorting

CoP workshop participants divided into small groups and undertook a sorting activity. Descriptions written on cards needed to be sorted under the headings 'Participatory' or 'Not participatory'. The aim of this was to generate discussion on how different methods of data collection can be classified, and to spark awareness of the ways in which context can change how a method is used or perceived. Most groups found that a number of the descriptions could fall under a third heading 'either/ or both', depending on various contextual factors.

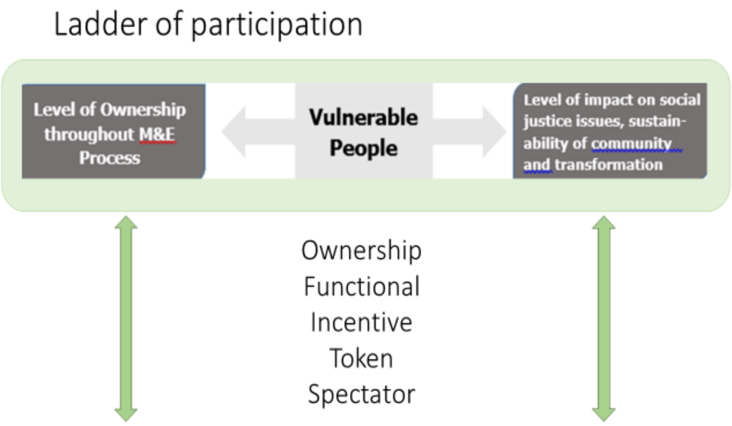
The descriptions and an example of how groups might have allocated these is given below.

Participatory	Either/Both	Not Participatory
Facilitators work with and listen to community	Quantitative methods	Teaching and lecturing
Can help sustain a program	Mixed methods	Includes token representation by participants
Data is owned by participants	Triangulation	Data is owned by the evaluator and program sponsor
Supports a group or community to identify activities that help solve and meet their needs while identifying opportunities	Analyses the current situation and potential in a community	Evaluator is the expert
Facilitators guide discussion during community exercises	Analyses needs, problems and their causes	Diversity and difference are downplayed
Focuses on the individual learner/ participant	Requires random sampling	Didactic learning
Can transform participants	Requires as few as 2-3 program participants to be involved in the evaluation	Perspective of the program funder is primary
Requires trust		Is immune to participant vulnerabilities
Community and facilitators learn together		Diverse perspectives are not valid
Brings both outsiders and insiders to deal with issues on common grounds		
Evaluation methods are predetermined and rigorous		

Some points of discussion that emerged from this activity:

- Triangulation of data could be handled in either a participatory way or not, depending on the type of data involved and ways in which participants are included.
- Ownership of the data is also contentious. There are different understandings of what it means to 'own' data. In addition, if the evaluation has been commissioned, then the funder owns the data and has to authorise its release. Some data is sensitive, and beneficiaries may not benefit from release of the data. Many of these decisions depend on the type of project involved, and the nature of the data related to the project
- Programme beneficiaries should be entitled to receiving evaluation results and getting feedback on the project, even if there are various contextual constraints. These issues need to be discussed up front with funders and clients by participatory evaluators.
- In real life many of the participatory descriptions given in the column above depend on preparatory work, in that a key factor is the building of trust which takes time.

Activity 2: Ladder of participation



Workshop participants discussed what is meant by the different levels of participation (ranging from ownership to spectator) by project beneficiaries. See presentation for descriptions of these levels.

Key points in discussion:

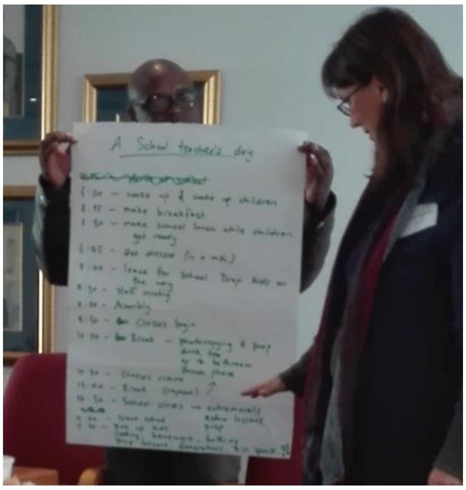
- What does participation really mean in terms of evaluation? We need to note that it is not always feasible to have overall participation throughout the process, as there are often tme and budgetary constraints in an evaluation.
- Evaluation Terms of Reference often refer to 'client voice' but then do not budget for it.

- The notion of using 'incentives' in gathering evaluation data is sometimes frowned on, based on the fear that beneficiaries might then tell evaluators what they think the evaluators want to hear. However, the use of incentives need not be dismissed out of hand; there are some valid contexts in which incentives are appropriate, and it is also problematic to make assumptions about the effects of incentives.

Activity 3: Pocket Chart Voting

This method allows for participants to 'vote' anonymously on various issues, and can be handled through visual aids. In our modelled activity, 8 constraints to small scale agriculture (e.g. access to finance, access to land, pests, weather …) were visually represented, and workshop participants ranked them in terms of the degree of challenge each represented. It was important to note that this data could be quite subjective, and could also be affected by context (for example, people's answers might change depending on the time of year, as seasonal weather might be top of mind). The usefulness of this technique lies in the fact that prompts programme participants to bring up contextual issues, thereby helping the evaluator understand opportunities, barriers and consequences in relation to the programme elements.

Activity 4: Mapping and Scheduling



Participants worked on two different 'storylines' to experience this data collection method:

- Mapping of a young girl's route to school, which illustrated a number of risks and time factors that may feed into interpretation of the data.
- Daily schedule for a teacher's day, which also illustrates time constraints and other contextual pressures that may have impacted on the programme.

The aim of mapping or scheduling is to elicit key information that may not have come out in a survey or through a more formal key informant interview. This kind of activity tends to get to the minutiae of the experience, aiming to go deeper and making data collection more practical. Getting programme beneficiaries to engage in mapping or scheduling in the context of an intervention can take place at any time, and could in fact be useful for pre-implementation planning in order to identify possible risk factors to the project.

Some closing reflection from CoP members

- From a provider perspective we are often given a programme framework within which to work; we might need to negotiate some of these alternative data collection methods.
- The move away from tick box M&E is to be welcomed.
- These creative ways of getting information could be applied at any point in a programme, and are also helpful to facilitators and project managers as well as evaluators.
- This is a very inclusive and humanising approach to M&E.
- Those who commission M&E need to be made more aware of the sensitivities of data collection, and the time required to build up the trust needed to get reliable data.

Annexure

Surname	Name	Organisation	Surname	Name	Organisation
Khan	Zarina	Facilitator	Wyatt	Alyna	Genesis Analytics
King	Melissa	BRIDGE	Peterson	Zenobia	JET Education Services
Kotschy	Karen	Association for Water and Rural Development (AWARD)	Phitidis	Kimon	Social Innovations
Landsman	Priscilla	The Wot-If Trust	Reddi	Benita	JET Education Services
Le Mottee	Kaley	BRIDGE	Rahiman	Fatima	Saide
Lubala	Sarah	BRIDGE	Simangaliso	Twala	COUNT
Magoronga	Wendy	Khulisa Management Services	Caroline	Stapleton	Genesis Analytics
Naidoo	Kanthan	Department of Basic Education	Taimo	Leticia	Khulisa Management Services
Nxokwana	Ongeziwe	BRIDGE	WIlliams	Edcent	Private