# Top Ten Tips for M&E Capacity Development in Organizations

The following are some recommended principles to keep in mind when supporting monitoring and evaluation (M&E) capacity development in organizations. They are based on an expert lecture by Scott Chaplowe at the American Evaluation Association (AEA) 2017 conference in Washington, D.C. They are discussed in more detail at www.ScottChaplowe.com. An ancillary tip (#11) could be that the top 10 list is far from exhaustive: as they are about human organizations and behaviour, they are not absolute.

1. **Adopt a systemic (systems) approach to organizational M&E capacity development**. M&E capacity development does not happen in isolation, but is embedded in complex social systems, and these interventions need to be tailored according to the unique configuration of different factors and actors that shape the supply and demand for M&E.
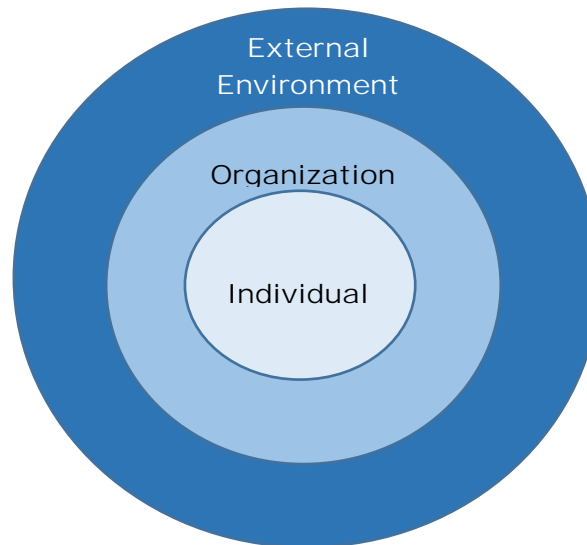
Adapted from Horton et al., 2003, p. 30.

2. **Plan, deliver and follow-up M&E capacity development with attention to transfer**. If organizational M&E capacity development is to make a difference, it is not enough to ensure learning occurs; targeted learners need to apply their learning.

3. **Meaningfully engage stakeholders in the M&E capacity development process.** M&E capacity development will be more effective when it is done *with* rather than *to* organizational stakeholders. Stakeholder participation is more than just consultation, but direct opportunity for people to provide input, become involved in, understand and sustain investment in M&E.

4. **Systematically approach organizational M&E capacity development, but remain flexible and adaptable to changing needs**. M&E capacity development is intentional and conducted to meet specific needs, and thus should be orderly planned. However, a systematic approach does not mean a rigid blueprint that is blindly followed, but instead it should be adaptable to the dynamic nature of the system in which an organization is embedded.

5. **Align and pursue M&E capacity development in relation organizational objectives**. A systemic approach to M&E capacity development includes careful attention to other organizational objectives and capacity building interventions. M&E capacity development does not exist for its own sake, but as a means to an end relative to the organization's overall mission and strategic objectives.

6. **Ensure your M&E capacity development strategy is practical and realistic to organizational capacities**. M&E capacity development should be realistic given the available time, budget, expertise and other resources.

7. **Identify & capitalize on existing sources for M&E capacity development**. There are a multiplicity of resources for and approaches to M&E capacity development, ranging from face-to-face training to eLearning, that can be used in solo or blended as part of a capacity building program that supports different learning styles and needs.

8. **<u>Design and deliver learning grounded on adult learning principles</u>**. Adults are self-directed learners that have past experiences, values, opinions, expectations and priorities that shape why and how they learn. Principles for adult learning stress a learner-centered approach that is applied, experiential, participatory and builds upon prior experience.

Key Adult Learning Principles for M&E Training
1. **Establish a safe and respectful climate** – Adults learn better when they feel safe and respected.
2. **Respond to the "need to know" (NTK)** – Adults prefer to know what, why, and how they are learning.
3. **Provide a structured yet flexible progression** – Adults prefer learning that is well-organized.
4. **Empower with genuine participation** – Adults want to share full responsibility for their learning.
5. **Incorporate past experience** – Adults prefer learning that builds upon their prior experience.
6. **Keep it relevant & meaningful** – Adults prefer practical learning that meets their needs.
7. **Provide direct experience** – Adults learn best by doing.
8. **Make it active, fun and challenging** – Adults learn more when it is engaging and enjoyable.
9. **Use mixed/multisensory methods** – Adult learners require a mixture of learning approaches.
10. **Differentiate instruction** – Adults learning is more effective when instruction is tailored to different learners' needs.
11. **Utilize collaborative, peer learning** – Adults effectively learn from each other.
12. **Include practice and repetition** – Adult learning is enhanced by repetition.
13. **Design for primacy and recency** – Adults remember best what they learn first and last in sequence.
14. **Provide feedback & positive reinforcement** – Adults want to know if they are learning, and to be encouraged in the process.

Chaplowe & Cousin, (2016). ***M&E Training: A Systematic Approach***. Sage Publications

9. **<u>Uphold professional standards, principles and ethics</u>**. An essential aspect of capacity development is to instil an understanding of and appreciation for ethical conduct and other standards for good practice. Specific guidelines and principles will vary according to context, but here are some considerations:

From the Evaluation Profession:
- *Guiding Principles For Evaluators* (AEA, 2004)
- *Program Evaluation Standards Statements* (Joint Committee on Standards for Educational Evaluation, 2015)
- *Statement on Cultural Competence in Evaluation* (AEA, 2011).

From the Professional Development Profession:
- *Standards on Ethics and Integrity* (Academy of Human Resource Development, 1999)
- *Code of Ethics of the National Association of Social Workers* (NSAW, 2008)
- *Code of Ethics for Training and Development Professionals in the Human Service* (National Staff Development and Training Association, 2004)
- *American Society for Training & Development's Competency Model* (ASTD, 2013)
- *National Staff Development and Training Association's Instructor Competency Model* (NSDTA, 2004)

10. **<u>Monitor and evaluate your M&E capacity development efforts to learn and adapt</u>**. M&E should practice what it preaches and track and assess M&E efforts to adapt, improve and be accountable to M&E objectives and stakeholders. It is important to remember to not only focus on the M&E of identified M&E objectives, but to remain alert to unanticipated consequences, whether positive or negative, and other contextual cues (e.g. opportunities and threats), so the M&E strategy can be revised and adapted accordingly – which brings us full circle to tip #1 on adopting a systems perspective for M&E.