Participatory Monitoring Case Study: Communities Take the Lead with Picture-Based Tools

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Executive Summary

INTRODUCTION

OneVillage Partners is a community-led organization operating in rural Sierra Leone where projects are designed, implemented, and monitored by community members. Programs are monitored and evaluated using a mixed-methods approach which contributes to the fulfillment of the organization's values. The focus of this case study is the participatory picture-based monitoring of the Community Action program (ACT) conducted by community volunteers on self-selected outcomes.

This case study is for practioners interested in learning more about how program participants can lead monitoring and evaluation activities, specifically, a picture-based household survey of prioritized outcome indicators. As OneVillage

OneVillage Partners' Values

Partners implemented and adapted the participatory picture-based monitoring process, we learned valuable lessons about how to make the process more community-led and successful. We want to share those lessons with other practitioners who not only aim to include program participants as data sources, but in Monitoring, Evaluation and Learning (MEL) decision-making and implementation.

PROCESS

The case study outlines how OneVillage Partners designed and implemented a participatory monitoring assessment and the lessons we learned along the way. The process specifically outlines how community members took the lead in designing and collecting data for quantitative outcome indicators using picture-based workbooks.

- **Pre-Implementation**
  - Research Design: Discusses the questions OneVillage Partners asked during research design and the resulting decisions reached in collaboration with community members.
  - Training: Includes the training topics and successful approaches OneVillage Partners' staff implemented to increase understanding and accuracy.
  - Field Work Preparation: Explains the picture-based workbooks community members use to collect data.
- **Implementation**
  - Field Work and Data Quality Assurance: Outlines common field work issues as well as risk mitigation strategies.
- **Analysis**: Includes how to determine responsible parties for data analysis as well as the analysis OneVillage Partners conducts.
- **Results Sharing**: Outlines methods to share results with the entire community to validate the data, maintain accountability, and brainstorm solutions to areas where the program is not meeting the community's goals.

Community Members Practice Using Picture-based Monitoring Workbooks

LESSONS LEARNED

- Community-led monitoring is challenging, but inevitably results in increased buy-in, more relevant data, and staff capacity building.
- There is a bias for positive results; data collectors want the project to be seen as successful.
- Participatory monitoring and evaluation improves project outcomes and contributes to sustainability.

TIPS FOR SUCCESS

- Put community partners' opinions first.
- Aim for flexibility based on community priorities.
- Complement picture-based workbooks with varied PME methods to ensure technical capacity building.
- Use appropriate and feasible methods to increase accessibility and inclusion.
- Build in data verification and quality assurance.

LOOKING FORWARD

At OneVillage Partners, we review our work frequently to increase effectiveness. In the future, we are considering updates to involve communities in assessing how community-led their projects are, increase participation in indicator definition, increase attendance at results sharing meetings, formally follow up on action plans made during results sharing meetings and being flexible in indicator selection 1-2 years after project completion.

CONCLUSION

Implementing participatory monitoring is challenging and requires an investment of time and money, however, the outcomes are well worth it. The picture-based workbook tool to measure community-selected quantitative indicators has been a method OneVillage Partners has found successful in maintaining community ownership in the post-implementation monitoring of community-led projects.

Community Members and OneVillage Partners Staff after Completion of Participatory Monitoring Training

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Acronyms

Acronym	Meaning
ACT	Community Action Program
CAG	Community Action Group
MEL	Monitoring, Evaluation, and Learning
PME	Participatory Monitoring and Evaluation
WASH	Water, Sanitation, and Hygiene

Acknowledgements

Introduction

OneVillage Partners' community-led development approach is successful because interventions are inspired, created, implemented and evaluated by community members.

OneVillage Partners

OneVillage Partners believes that local people are integral in developing community solutions to their self-defined needs, and broad participation and local change agents are necessary for ongoing community development. By focusing concurrently on training and infrastructure, participants gain tangible skills to further their own development while supplementing local infrastructure to meet a community's felt needs. The organization's values of community-leadership, equity, sustainability, and discipline aim to stimulate unity and a collective sense of ownership among community members.

Monitoring, Evaluation, and Learning Strategy

OneVillage Partners' Monitoring, Evaluation and Learning (MEL) strategy is highly participatory and serves two purposes. First, it serves to inform the organization's programs to make strategic adaptations and improvements. Second, it serves to include community members in the monitoring and evaluation of their projects to promote learning, capacity development, and improved project outcomes and sustainability. The strategy is anchored in accessibility, participation, and accountability, with the community members as the ultimate user and driver of the data. The organization utilizes a mixed-methods approach to monitor, evaluate, and learn about the programs implemented and the outcomes produced.

Figure 1: Monitoring, Evaluation, and Learning Strategy Foundation

As part of the MEL strategy, OneVillage Partners developed this case study highlighting a method used to measure the impact of the Community Action Program (ACT). This program is one component that contributes toward achieving the goals in the organization's Theory of Change. This case study was designed specifically for OneVillage Partners' supported communities in Sierra Leone based on their desired skills, input and cultural context. The case study focuses on successful staff facilitation techniques and learning. The intent of sharing this case study is to increase the use of community-led approaches within the international development community. For further information please visit our website (www.onevillagepartners.org) or contact enquiries@onevillagepartners.org

Participatory Monitoring & Evaluation

Participatory Monitoring & Evaluation (PME) is an evaluation approach that works in partnership with program stakeholders at all phases of evaluation with the goal of ensuring the evaluation asks the right questions and includes stakeholder buy-in. [1] The goal of PME is to "build the community's capacity to track the progress of its own development." [2]

There are many benefits of PME[1,3] including:
- Greater understanding of program strategy, strengths, and weaknesses by stakeholders, which contributes to program sustainability
- Capacity building and learning experience for stakeholders
- Inclusion of "insider" perspective in evaluation findings and recommendations
- Increased authenticity of results that are locally relevant
- Greater use of evaluation results by program decision makers

As a community-led development organization, PME methods are a natural fit with the OneVillage Partners model; it is necessary to carry through our community-led value from project design to evaluation design. This case study focuses on one part of this strategy, the volunteer-led participatory monitoring of ACT project outcomes. Community volunteers conduct project monitoring of self-selected indicators using picture-based workbooks. This case study outlines how we involve community members in designing and collecting data for quantitative outcome indicators. It does not provide guidance on how to develop a quality indicator or how to design a comprehensive PME strategy, as there are many resources available on those topics already which can be found in **Appendix 3: References and Additional Resources.**

Community Action Program (ACT)

To provide context on what the participatory monitoring method in this case study monitors, the following section briefly outlines the ACT program. ACT mobilizes, trains, and supports community members to achieve their vision of an improved standard of living for all. Community volunteers are selected by their peers to form the village's gender-balanced Community Action Group (CAG). Once selected, the group undergoes intensive leadership training to produce targeted development projects to effectively meet community-identified needs. As a product of the training, the CAG design, implement, and monitor a project created to address a need prioritized by the entire community. Projects have spanned many sectors including water, sanitation, and hygiene (WASH), education, agriculture, health, and livelihoods. By engaging and empowering community members throughout the project cycle, the ACT program fosters transparency and inclusion — individual and community attributes that have far-reaching benefits.

Figure 2: Path to Thriving Communities

Pre-Implementation Preparation

Prior to implementing the participatory monitoring assessment, the MEL team and community members worked together to plan the assessment. This built off a collaborative relationship started in program planning.

Research Design

There are many resources for designing a PME system or activity (see **Appendix 3: References and Additional Resources**). The following section outlines the process OneVillage Partners implemented.

When designing the assessment, we aimed to answer research design questions collaboratively with community members. We came to a decision through considering factors that affected both groups.

During the research design process, we asked ourselves the questions outlined in **Figure 3** and came to the following decisions.

Data: **Quantitative data on project-specific outcomes selected by the community**
OneVillage Partners wanted an equitable and effective way to track progress in a non-extractive manner. Community members wanted to know if projects met their goals and actually addressed the pressing issues their community faced. Collecting targeted data from all households in the community on project-specific outcomes achieved both priorities.

Data — What type of data should be collected?
Method — What method is best to collect data?
Collection — Who should collect the data?
Frequency — How often should the data be collected?
Use — How will the data be used?
Capacity — What skills do training facilitators need?

Figure 3: Research Design Questions

Method: Picture-based workbooks for household surveys and observation
The picture-based workbooks are an approach adapted by OneVillage Partners to ensure inclusion of illiterate CAG members. The workbooks include a locally drawn picture to represent the indicator, space for the data collectors name, date of data collection, and a household listing (see **Figure 5** for a sample workbook). In addition to household data, some communities choose to collect observational data. This could include the number of open defecation sites observed or the amount of meetings recorded by the Facility Management Committee. The picture-based workbook method ensures that the type of data the community wants could be collected by their chosen representatives.

Collection: Community Action Group (CAG) members
With the CAG leading data collection, it was hypothesized that community buy-in, perceived validity, and uptake of the results would increase. The CAG design ACT projects with support from OneVillage Partners. Building on their previous training in project design and management to include MEL skills was an added benefit.

Frequency: Annually after project completion
The timing met the organization's needs for up-to-date data and did not place an unfair burden on the CAG.
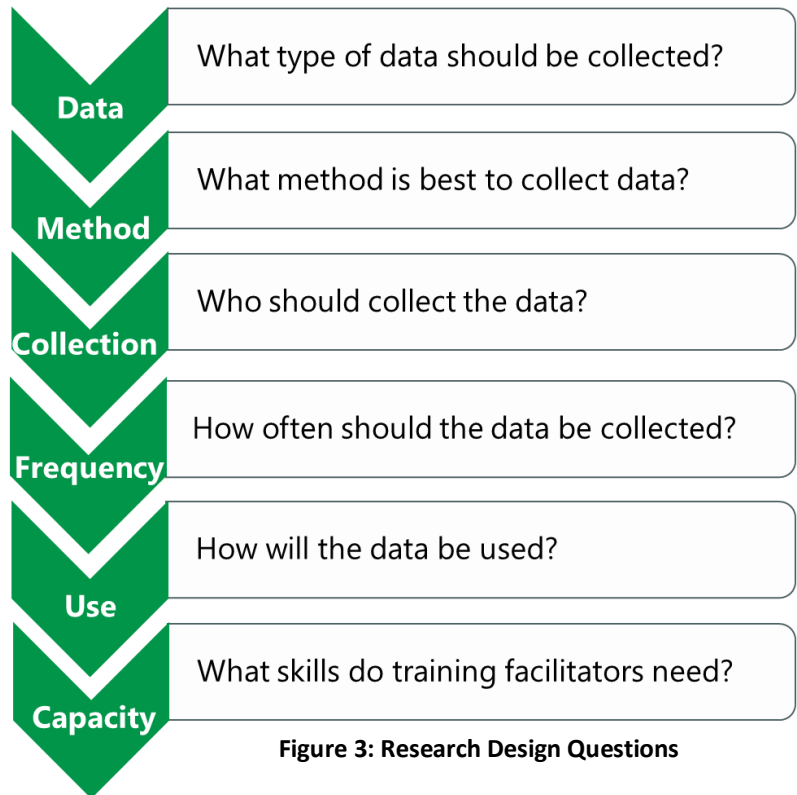
Use: Community progress report

The main data user is the community itself. It was decided the results would be presented as a progress report on self-selected goals and serve as the basis for action plans in areas not meeting targets. OneVillage Partners would also use the data to improve programs and mitigate challenges in similar projects in other partner communities.

Capacity: The MEL & ACT staff co-facilitate the exercise

It was decided that the MEL team and ACT program staff would co-facilitate the training of the CAG in the communities in order to combine expertise in project design and MEL system design. The trainer would "serve as a catalyst, bringing together varied experiences and perceptions of the participants." [3]

Training

Capacity building of community members is a benefit of PME that is not evident in conventional approaches. To ensure capacity building of MEL technical knowledge, OneVillage Partners tailored the training for the local context and revised it based on lessons learned during implementation. We ensure facilitators are properly prepared to implement the training, having reviewed the training outline and brainstormed multiple examples to increase understanding of difficult concepts. We have found the training should be facilitated in a collaborative way, avoiding a lecture-style approach and instead aiming to facilitate a discussion led by the ideas of the CAG. **Table 1** outlines high-level training topics; a complete outline of the training can be found in **Appendix 1: Training Outlines.**

Table 1: Training Topics

Training Topic	Context
Definition of impact, what impact does the community want the project to achieve?	This is mostly a review exercise to center the CAG in the project and the overall goal they want to measure.
Definition of project objectives	Staff needed guidance in supporting the CAG to create specific objectives. If objectives are vague, it makes indicator definition challenging.
Classification of project objectives into indicator categories	This exercise gets the CAG thinking about how objectives and indicators are related. They start to understand the indicator categories (including knowledge change, behavior change, and sustainability), and they see how each type of indicator measures project success differently.
Definition of monitoring, why do we monitor?	Staff workshopped many different examples to increase understanding of monitoring. The team included the most effective examples in the curriculum.
Defining indicators and setting targets	At first, the CAG were very ambitious and set high targets (> 95%). Then, when we instructed staff to course correct, CAG set targets too low to have any real impact (<45%). Now, we ask staff to encourage the CAG to set a target above 70%. We also learned that setting targets in numbers of households was easier to understand compared to setting targets in percentages.
Selection of a priority indicator	The priority indicator is the indicator that is the most crucial to project success. At OneVillage Partners, this is always a behavior change indicator. For example, if the community completed a sanitation project, the priority indicator could be "report of latrine use" or "number of open defecation sites observed."
Introduction to picture-based workbook, brainstorming of indicator pictures	Indicator pictures should be pre-tested with a group of participants prior to their inclusion in the workbook to guarantee common understanding. During the training, if it is clear a picture is not appropriately depicting the indicator, the exercise should be postponed until a more accurate picture is chosen.

Training Topic	Context
How to accurately fill in the work book	It is important to practice filling in the workbooks, review the household listing, how to record a positive response, how to record a negative response and what to do if no one is home at the time of data collection, in order to increase accuracy.
Discuss informed consent, role play to practice interviews	The images used in the workbooks are meant to help the CAG recall what question to ask during the data collection. During the role play, CAG can practice their understanding of indicators using the images as well as overall interview technique.
Create a data collection plan, timeline, check-in points	CAG organize themselves into data collection teams based on literacy level and where they live in the community. CAG often decide to collect data outside of their own neighborhood in order to reduce bias. If possible, the CAG try to include at least one literate person per data collection team.

Figure 4: Participatory Monitoring Training
(A) A CAG member practices completing a workbook during a training.
(B) CAG members participate in an activity highlighting the value of multiple perspectives on a single issue.
(C) OneVillage Partners staff explain the workbook to the CAG.

Field Work Preparation

To prepare for field work, OneVillage Partners staff create the picture-based workbooks. For household-level data, the team prepares separate workbooks for each community section listing all households using codes. All indicators requiring household-level data are included in the section workbook, so the CAG can ask all the questions at one time when they visit the home. At the beginning of partnership with a community, staff code all houses with chalk, therefore the CAG do not need to do a household listing prior to data collection. During the training, CAG decide who is responsible for collecting data in each community section. For observational data, staff make one workbook for the entire community.

The sample workbook in **Figure 5** is a real example from a community project with the goal of increasing education of girls. One of the areas the CAG wanted to measure was if parents of girls were talking to their children about their education. A "not applicable" response was included in the workbook due to the fact that not every household had a school-aged girl.

Community

Project Name

Data Collection Time Point

Indicator Definition

Indicator Image

Yandohun
Community-Led Support to Girls Education
Cycle 2, Year 1 Monitoring

Indicator 3: # of households able to explain a recent conversation with their girl child about education

Data Collector Name: _____

Date Completed: _____

Signature: _____

A1	✓	✗	O	A19	✓	✗	O
A2	✓	✗	O	A20	✓	✗	O
A3	✓	✗	O	A21	✓	✗	O
A4	✓	✗	O	A22	✓	✗	O
A5	✓	✗	O	A23	✓	✗	O
A6	✓	✗	O	A24	✓	✗	O
A7	✓	✗	O	A25	✓	✗	O
A8	✓	✗	O	A26	✓	✗	O
A9	✓	✗	O	A27	✓	✗	O
A10	✓	✗	O	A28	✓	✗	O
A11	✓	✗	O	A29	✓	✗	O
A12	✓	✗	O	A30	✓	✗	O
A13	✓	✗	O	A31	✓	✗	O
A14	✓	✗	O	A32	✓	✗	O
A15	✓	✗	O	A33	✓	✗	O
A16	✓	✗	O	A34	✓	✗	O
A17	✓	✗	O	A35	✓	✗	O
A18	✓	✗	O	A36	✓	✗	O

Household Codes

"Yes" Response

"No" Response

"Not Applicable" Response

Figure 5: Labeled Sample Monitoring Workbook

Implementation

During implementation, OneVillage Partners continues its supportive role to the CAG, only providing assistance when asked or when errors are made.

Field Work and Data Quality Assurance

During the training, CAG plan for data collection including the time allocated for the entire exercise, who is responsible for each geographical area, and what support is needed from OneVillage Partners.

It is good practice to assure data quality through multiple checks at different time points in the process. ACT Project Officers check in with CAG members and provide guidance where needed during data collection. The check-in timeline is set by the CAG themselves during training. Staff are prepped on what to look for in workbooks and what guidance to provide to CAG in order to increase data quality. On average, CAG plan for 2-4 weeks of data collection, with 1-2 check-ins with ACT Project Officers during that time.

Once the CAG submit the data, ACT Project Coordinators review it before submitting to the MEL department who gives a final review. If there are issues or questions with the data at any point, the ACT Project Officer returns it to the CAG, explains the issue and works with them to set an updated timeline for data submission.

Throughout implementation, certain issues have come up consistently and have informed training updates and guidance to training facilitators. For example, it is not uncommon for CAG members to make mistakes when filling out the workbook, such as those outlined in **Figure 6**. In the figure, multiple responses are recorded for the A2 household, (circling both the x and the check mark), the response for the A4 household is unclear and no response is marked for the A6 household, instead the household code is circled. Another common mistake is submitting workbooks with missing data (as symbolized with households A1, A3, and A5 in **Figure 6**).

A1	✓	✗	O
A2	✓	✗	O
A3	✓	✗	O
A4	✓	✗	O
A5	✓	✗	O
A6	✓	✗	O

Figure 6: Workbook Data Collection Errors

Another challenge we have encountered is the submission of unlikely or implausible data. This normally highlights a misunderstanding of the indicator, or an error in data collection. For example, a CAG once recorded 100 project community meetings occurred within the space of one year. When this data was flagged and returned to the CAG, they explained that they thought the indicator was asking about the number of people that had attended project community meetings within the last year. A final challenge worth mentioning is the late submission of data. CAG are volunteers, they collect the data on their own time. It is not uncommon for CAG to prioritize their own income-generating or family activities over submitting workbooks on time. As a community-led organization, we strive to maintain flexible timelines to respect the competing priorities of the volunteers.

Analysis

Depending on the complexity of the data, the skill set and available time of community members, and access to resources (i.e. computer, electricity), it is possible for community members to analyze the data. At OneVillage Partners, this is not feasible for a for a variety of reasons, including limited literacy and numeracy, lack of access

to electricity and technology, and the added time investment on both the part of the CAG and OneVillage Partners. Due to these reasons, the MEL staff enter the data from the paper workbooks into MS Excel and conduct the analysis, calculating the proportions of households that achieved each indicator. The team compares the results to the target set by CAG during training as well as to previous rounds of data collection. Another possibility would be to compare data across communities, if multiple communities had implemented a similar project.

Results Sharing

One of the main purposes of PME is to gather relevant data on indicators that measure success as the community defines it. Therefore, sharing the data in an accessible and timely manner is one of the most important parts of the process. A sample results sharing community meeting agenda is included in **Appendix 2: Sample Results Sharing Meeting Agenda**.

Some outcomes of sharing the results in a public forum include:
- Validates data at the community level.
  - Despite training and support, some data collectors may alter the data to demonstrate project success, especially if they have a high personal stake in the matter. Sharing the results in a community forum normally brings this out and sparks an honest discussion about the real situation in the community relating to project outcomes.
- Maintains organization and CAG accountability to community.
- Provides a progress report on community's achievement of self-selected indicators and targets.
- Creates a space to formulate action plans if targets are not being met.
- Sparks programmatic learning through review of lessons learned and unexpected challenges from projects. Additionally, how each community addresses areas where they are not meeting targets provides valuable information about communal decision making and problem solving.

Figure 7: Results Sharing at a Community Meeting

At OneVillage Partners, we ensure accessible results sharing in the following ways:

Venue: Results are shared in a community meeting held in a common space. The community is notified in advance to encourage attendance. We avoid having meetings at the homes of village authorities or in a space that is owned by an individual. Situating the meeting in a communal setting reduces the chances of exclusion.

Participants: We encourage attendance of community leaders, general community members, marginalized groups, and data collectors. It is critical to have a varied audience at meetings to encourage candid discussion and interpretation of the results.

Facilitator: Most times, the meeting is led by a CAG member who was a part of the indicator selection, target setting, and data collection. Staff are present to support the facilitator as needed. Having the CAG lead the meeting increases the likelihood of understanding and uptake by the community.

Material: Data are represented using bar charts and pictures. The bar charts include the current round of data compared to the targets set and prior rounds of data (if applicable). The indicators used in the picture-based workbooks are enlarged and shown with the corresponding chart (see **Figure 8**). These charts and pictures are left in the community for display in the community meeting hall. We also use a group of people to denote changes in percentages. Using creative and accessible ways to present the results is necessary when working with a majority illiterate population.
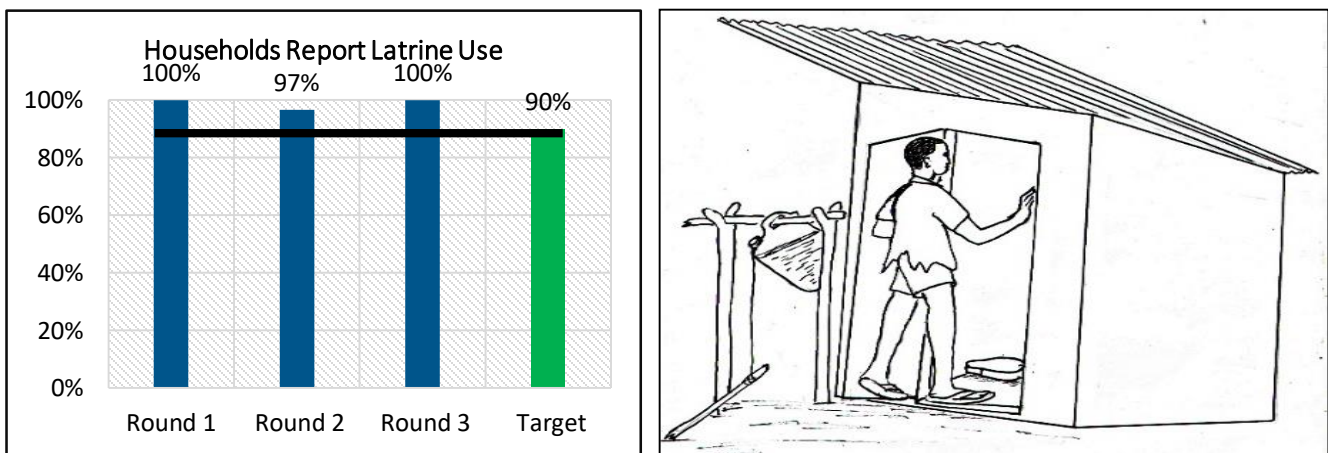

Figure 8: Results Sharing Bar Chart & Image for "Households Report Latrine Use" Indicator

Lessons Learned

Throughout implementation and strategic adaptations of the picture-based workbooks assessment in partner communities we have learned some valuable lessons.

- **Community-led monitoring is challenging but results in increased buy-in, more relevant data, and staff capacity building.**
  - When the CAG first started to determine the indicators in the picture-based workbooks it was a difficult transition. It was easier for staff trained in MEL to set indicators for a project; it took more work and time to first teach MEL concepts to the CAG and then support them to create indicators. With time and practice, staff leaned into their role as catalysts for community-led decision making in MEL. When the CAG set indicators, the resulting data are more relevant in measuring the project's success.
  - There needs to be a basic understanding of why monitoring and evaluation is important in order to get buy-in to do the hard work of creating indicators. Bringing in local examples and having the CAG explain the idea in their own words have been crucial to cultivating understanding of difficult concepts.

- The update process highlighted areas where staff needed capacity building. Our staff struggled with understanding the different indicator categories and setting specific objectives. If objectives are not specific, it is difficult to create measurable indicators. During training, management reviewed these areas, and understanding increased among staff. The exercise provided a great opportunity for partnership between Programs and MEL department staff.

- **There is a bias for positive results; data collectors want the project to be seen as successful.**
  - One of the drawbacks to including primary stakeholders in any monitoring and evaluation activity is the chance for misrepresentation of the data. This phenomenon is not limited to community members, it can happen with program staff, or even in extreme cases, internal evaluators. However, it is not an insurmountable obstacle; with proper explanation of the purpose of monitoring and evaluation as a measure of the project's meeting of community needs, it is possible for community members to provide accurate data.

Figure 9: OneVillage Partner Staff Facilitating *Plan Monitoring* **Training Session**

  - At OneVillage Partners we have had experiences on both ends of the bias spectrum. Community members have called out CAG members for providing false data, which sparked a conversation about the community's actual performance on indicators and how to improve it. Alternatively, CAG members have been chastised for providing accurate data that demonstrates the community is not meeting their goals. People expressed concern that the "bad" data would discourage OneVillage Partners from future partnership with the community. Staff and CAG members resolved these concerns by restating the purpose of the exercise as a community update, not a report card.

- **Participatory monitoring and evaluation improve project outcomes and contribute to sustainability.**
  - When communities know how they perform on indicators of their choosing, most times they mobilize to improve their performance. We have experienced this in multiple ways: the repair of broken-down assets, the setting of a by-law by a village authority to increase behavior change compliance, people volunteering to educate fellow community members in project areas, to name a few. Sharing results is one of the most effective ways for communities to hold themselves accountable to the goals they set for themselves, thereby increasing the sustainability of the project and its desired outcomes.
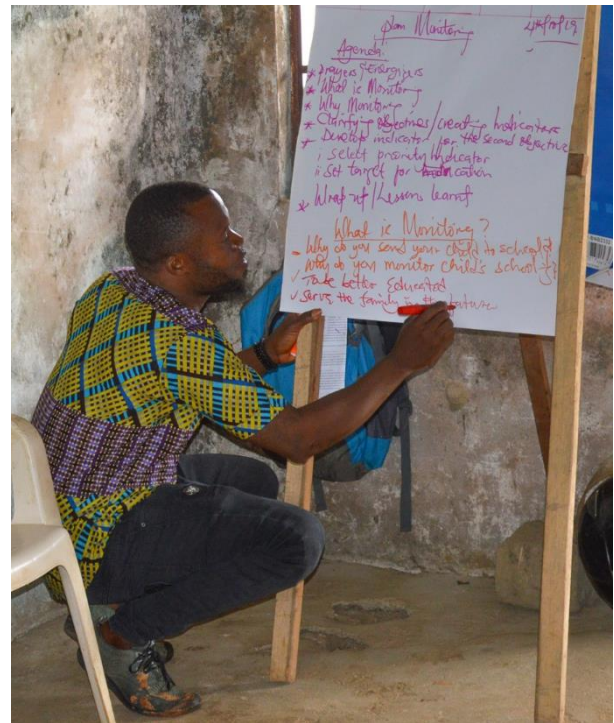
Tips for Success

Before implementing this method, or any PME method, practitioners should consider a few key points:

Put community partners' opinions first: The needs and wants of community partners should be the foremost consideration. What kind of data do they want? What does success look like to them and what is the best way to measure it? The resources of the partner organization will also be a factor. Are the staff adequately trained to implement the method? Is there enough time in the project cycle to implement the method? Even with the most participatory of PME methods, practitioners should recognize the inherent power differentials at play during the process and do their best to mitigate them.
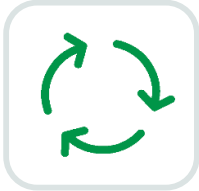
Aim for flexibility based on community priorities: Depending on the timeline of the evaluation and the program, priority indicators may shift. The process should be flexible to adjust for new priorities of community members or unintended project outcomes.

Complement picture-based workbooks with varied PME methods to ensure technical capacity building: It is not realistic to expect local partners to gain technical MEL capacity from a one-off exercise. Through the utilization of complementary PME methods, community members can develop their capacity to understand the value of MEL and eventually design MEL plans unassisted for self-started development projects.
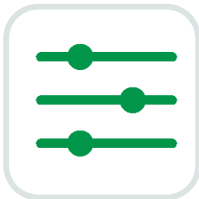
Use appropriate and feasible methods to increase accessibility and inclusion: Picture-based workbooks to collect household and observational data may not be the best approach for all programs or communities. Other effective PME approaches include community monitoring tables, community score cards, citizen report cards, social audits, Most Significant Change, PhotoVoice, Sensemaker, Ripple Effect Mapping, Outcomes Harvesting, and others.

Build in data verification and quality assurance: As with anyone learning a new skill, data collectors will make mistakes. Having built-in mechanisms for data verification and assurance can address any errors before the data is finalized. These mechanisms also help to further build the skills of the data collectors.

Looking Forward

At OneVillage Partners, we review our work frequently. Below is a summary of some areas we have highlighted where we can improve the implementation of picture-based monitoring workbooks.

Data: The community originally prioritized project-specific outcomes, but it would be valuable to have the CAG asses how community-led their work with OneVillage Partners is. UNICEF's Minimum Quality Standards and Indicators for Community Engagement includes guidance on how to craft locally-defined indicators for the different components of community engagement including participation, adaptability, integration and ownership.[4] This could be a useful tool to guide us as we explore this new direction.

Participants: The process would be more representative if a larger group of community members were involved in defining indicators, as opposed to just the CAG members. Currently, this presents too many logistical challenges; though creative solutions remain to be explored.

Results Sharing Meeting Attendance: In some communities it is difficult to mobilize community members to attend the results sharing meetings. This limits the reach of the results as well as the success of the action plan. The team should investigate success factors in communities with high turnout for meetings, as well as, potential barriers to attendance in communities with low turnout.

Follow Up: We do not formally follow up on action points decided in the results sharing meeting. ACT staff occasionally report action plan progress, but only on an anecdotal level. The team should consider implementing a standard follow up on action plans. This would help the organization learn if the community is actually following through on the commitments they set in the meeting.

Flexibility: The CAG collect data on the same indicators annually after project completion for up to three years. It could be useful to re-evaluate indicators 1-2 years after the project to re-focus based on shifting community priorities.

Conclusion

Implementing participatory monitoring is challenging and requires an investment of time and money, however the outcomes are well worth it. Not only does stakeholder involvement increase the likelihood of accurate and reliable data and interpretations of that data, it is also an ethical way to partner with communities on development projects. When program participants create the indicators, decide the data collection plan, collect the data and present the results to the community, they build important skills which will help them lead successful projects independent of our organization. When community members determine the data collected, they are more invested in the results and hence project sustainability increases.

OneVillage Partners has found the picture-based workbooks to be successful in maintaining community ownership in the post-implementation monitoring of community-led projects. The method brings our community-led value into our MEL practice and ensures that communities hold themselves accountable to the goals they set for themselves.

Partner organizations need to lean in to their role as facilitators of development, not as sole implementers. This requires re-framing of development work, mainly that evidence should be generated for and by stakeholders, instead of being led by donor frameworks. We hope this case study has provided tangible and actionable guidance on one method that can be used to meet this goal.

Figure 10: Community Volunteer Explaining Results During Community Meeting

Set Objectives Training Session

Objective: Trainees identify the impact their community project will have

Outcomes:
- Trainees develop Activities, Output, Outcomes and Impact for their project
- Trainees complete an Objective Tree with objectives classified into indicator categories

Outline
1. Welcome and Review of Previous Sessions
2. Look for impact
   a. What is impact?
   b. What is the vision of impact for this project?
3. The Objective Tree
   a. First a seed (Activity) is planted into the soil, then it must be watered. What happens because of that? A seedling emerges (Output). To cultivate the seedlings growth, we have to weed around it. If the Seedling can grow properly it becomes a sapling (Outcome). A sapling will not immediately become a strong tree though. Branches need to be pruned so it grows straight and tall. Finally, after some time we have our Tree (Impact).
4. Define Impact
   a. Introduce Activity-> Output-> Outcome-> Goal
      i. *Education Project:* If we improve children's reading skills (activity), then the children will have better reading skills (output). If the children have better reading skills, they will be able to understand their subjects better (outcome). If they can understand their subjects better, they will be better students (Goal).
   b. Identify activities to help achieve the goal and discuss why those activities need to happen
   c. Define impact of each activity and therefore the overall project
5. Classify Objectives into Monitoring Indicator Categories
   a. Introduce and explain indicator categories (Education, Knowledge Change, Access, Behavior Change, Sustainability).
      i. To become a football player: First you watch football to see how to play, then you learn how to play (Education), then you know how to play (Knowledge Change), then you get a football (Access), then you start playing football regularly (Behavior Change), then you have played on a football team for over a year (Sustainability).
   b. Classify the outputs and outcomes from the Objective Tree into the indicator categories
6. Wrap-Up

Plan Monitoring Training Session

Objective: Trainees know why monitoring is necessary and gain skills in determining indicators

Outcomes:
- Trainees can identify at least three reasons why you monitor
- Trainees finalize project monitoring indicators

Preparation:
- Have some tested ideas for objectives and indicators brainstormed from previous discussions with the trainees
- Have the completed Objective Tree and Objective Classification Table ready to discuss with the trainees

Outline
1. Welcome
2. What is Monitoring?
    a. Continue with examples from Set Objectives session, but include a monitoring component
        i. *Education Project:* If we improve children's reading skills (activity), then the children will have better reading skills (output). If the children have better reading skills, they will be able to understand their subjects better (outcome). If they can understand their subjects better, they will be better students (impact/goal).
            1. What do we need to measure to make sure this vision is being met?
            2. Break down the parts of the vision
                a. Reading activity occurs
                b. Improved child reading ability
                c. Improved marks in school subjects
                d. More students promoted to next level
            3. Discuss how you would know each part of the vision is being achieved
                a. Reading activity occurs: Record the number of children that participated in activity, how long the activity was, how many days, etc.
                b. Improved child reading ability: Do a test before the reading activity and after. See how many kids get better marks on the test that happens after the reading activity.
                c. Improved marks in school subjects: Track the marks from the previous term and the term after the reading activity. See how many kids get better marks in school after the reading activity.
                d. More students promoted to next level: Track the number of kids promoted to next level before and after the reading activity.
3. Why do we Monitor?
    a. We monitor to see if we are achieving what we said we would achieve; we monitor to see the project from different perspectives; we monitor to improve the project. Monitoring gives you confidence that the change you wanted to see is happening **OR** highlights areas that still need improvement.
4. Set Indicators and Targets
    a. Review objective tree, objective classification table
    b. Discuss how objectives can be used to create indicators
        i. Objective: Community Members are knowledgeable about the dangers of open defecation (education). Indicator: "number of Community members that correctly identify three or more ways open defecation is dangerous"

   c. Case study the trainees to turn the objectives into indicators
      i. For each indicator discuss:
         1. Who do we need to ask the question to? (Who is being impacted?)
         2. How will we know the objective is being met? What is the impact on the core user group? Where is that impact taking place? When will that impact take place? (There can be multiple answers to some of these questions.)
         3. Is this something we have the capacity to measure? Readily available information? Will people be honest in their responses?
         4. How many people should be doing this for it to be a good sign of progress? (setting targets)
         5. How can we collect this data? (data collection method)
      ii. Category specific probing questions for indicator development:
         1. Knowledge change: How will we know if people's knowledge has changed? What types of questions can we ask to check their understanding?
         2. Access: How can we check that the core user group has access to the project?
         3. Behavior change: What types of behaviors do we want to change? How will we know if they have changed? What do you expect the community to do differently after the project?
         4. Sustainability: What are some early signs of project sustainability? What would show that the community is committed to keeping the project operational even after OVP leaves? What steps have they taken to achieve this?
   d. Set a target for each indicator, have trainees select five top indicators with one as their "priority indicator"

5. Introduction to Picture-Based Workbooks
   a. Review of picture-based workbook example (will not be from this project because they just decided the indicators)
   b. Explain the layout of the workbook, how it is filled
   c. Brainstorm ideas for what pictures could be used to represent the top five indicators the trainees just created

6. Wrap Up

Picture-Based Monitoring Refresher Training Session

Timeline: Before any round of data collection

Objective: Trainees are adequately informed and prepared to collect high quality data

Outcomes:
- Trainees understand the purpose and importance of monitoring
- Trainees understand how to collect monitoring data
- Trainees receive and understand the data collection workbook
- Trainees are divided into data collection teams, create a data collection plan

Preparation:
- Printed workbooks, sample copies of workbooks for practice during training

Outline
1. Welcome
2. Monitoring Review
   a. Monitoring takes place along different tracks: It will include observation, house to house interviews, or record checking. Remind the group that it's not just about the data collected, or the answers to the interview questions. The purpose of monitoring is to see how far the community has come and where they can continue to improve.
   b. Review evaluation example from previous training
   c. Why do we monitor?
      i. Quite simply, we monitor to find out if we are achieving what we said we would achieve. But sometimes it's not easy to see the whole impact. We can demonstrate this:
         1. Have three trainees stand in a line, one in the back, one in the front.
         2. Have the trainees in the middle do something subtle that can only be seen when facing forward, like winking or smiling.
         3. Have the person behind the trainees in the middle describe what they are seeing. Ask them, what do you think the other person sees?
         4. Now have the person in front say what they are observing. Finally, mention the subtle thing the trainees in the middle is doing.
      ii. Explain: When we are evaluating we can't rely on one perspective alone. We have to plan on seeing our progress from many different angles to get the full picture.
   d. Monitoring as a Method to Highlight Improvements
      i. Without accurate data, no action can be taken to build on initial project success. If the community does not know where they haven't met goals, how can they be expected to change behavior in order to meet those goals? The more accurate the data, the better the community can achieve their goals.
   e. Summary: We monitor to see if we are achieving what we said we would achieve; we monitor to see the project from different perspectives; we monitor to improve the project. **Monitoring gives you confidence that the change you wanted to see is happening OR highlights areas that still need improvement.**
3. Re-Introduce the Indicators
   a. Review the project objectives
   b. Review the indicators and show how each relates to the objective
   c. Discuss the data collection method for each indicator
4. Re-Introduce the Data Collection Workbook

      a. Go through each page of the workbook. Discuss the indicators and how they are represented pictorially.

      b. Review how to use the workbook, how to enter data accurately

      c. Have sample workbooks available so trainees can practice filling out the workbook appropriately. Also use these workbooks during the role play.

5. Review data collection best practices

      a. Remain respectful: Always greet and ask permission before asking the questions

      b. Ask the question the way you practiced as a group: Remember, the way the question is asked has a lot to do with the type of data that you will collect.

      c. No assumptions: When you are making observations for collecting the data, report what you are seeing, not what you think is happening.

      d. No leading questions: monitoring is not a test of the community; it should be neutral. In fact, the more authentic the answer, the more useful the data

      e. Keep to an established schedule.

6. Role-Play the Monitoring Workbook

      a. Divide trainees into pairs, with one person as the interviewer and the other as the interviewee. Practice interviewing based on the specific indicator script. Have one group come to the front and practice collecting data for one indicator. Group should discuss what they did well and what they need to improve on.

      b. Pairs work practice the rest of the indicators with facilitator guidance as needed.

7. Assign Roles and Make a Plan of Action

      a. Trainees divide themselves into data collection groups, decide which part of the community they will survey and create a work schedule

      b. Trainees decide what support they need from partner organization

At the conclusion of the data collection process the partner organization should implement the following data quality checks:

- Completion (Is there data for every household? Are all indicator sheets filled out?)
- Data quality (Is only one answer option selected for each household? Are there any confusing marks that are unclear? Is there any data that is too good to be true?)

If issues are found, the partner organization should return with the workbook to the trainees and determine what the issue is and how to address it.

Appendix 2: Sample Results Sharing Meeting Agenda

- **Welcome, introduction of meeting facilitators**
- **Introduce Monitoring and Data Collection**
    a. Brief explanation of monitoring and why the data was collected
        i. Volunteers collected information about things that need to happen for the project to be successful
    b. Describe data collection timeline in relation to project completion
2. **Results Presentation and Discussion**
    a. Use participatory methods to communicate the results
        i. Pictures of indicators, bar charts
        ii. A group of 10 people can represent 100%, have people form different percentages based on the results (i.e. if target was 80%, 8 people would step forward, if they achieved 50%, only 5 would step forward)
    b. Present the results for each indicator, highlight their successes (where they met the target) and their challenge areas (where they did not meet their target)
        i. For areas where the community did not meet the target, come up with action points to address the issue (i.e. more household education, support from community leadership, etc.)
3. **Wrap Up**
    a. Briefly review the action points decided upon
    b. Refer attendees to where the monitoring results will be displayed in the community
    c. Thank the attendees for their time

Appendix 3: References and Additional Resources

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Additional Resources

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