

Action plan

Setting up a MEAL system

Programme title:

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1. Situational analysis of existing MEAL framework/component as from : \_\_\_\_\_\_\_\_\_\_\_\_ *(please insert date)*

**On what M&E ground was the \_\_\_\_\_\_\_\_\_\_\_\_\_ programme build on?** *(please highlight below)*

⬜ Diagnostic

⬜ Design of a Theory of change

⬜ Ex-ante evaluation

⬜ Baseline study

Timeline:

|  |  |
| --- | --- |
| Date: | Events: |
|  |  |
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|  |  |

**MEAL configuration in current structuration (knowledge and skills):**

 -What is the current inner state toward evaluation (adherence, burden, compulsory step), with respect to the MEAL function? Positive or negative experiences? What was ever learn by programme team members through previous M&E processes?

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-What are the internal competencies, knowledge and skills about MEAL (novice, intermediate, advanced…)? What team members skills may feed the MEAL process (statistics, in depth interviews, writing, photography, video,…)

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 **Positioning of the MEAL function in the organization chart**

*Please paste bellow the organization chart highlighting the MEAL function.*

What was the driving force to set up the programme? Where does the first impulse come from?

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Is there a specific MEAL working group in the Commitees? Who may serve the MEAL function in committees? What are the MEAL competencies, skills and knowledge of Commitees members?

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Who are the direct and indirect beneficiaries of the intervention? What is the current state of information about target population? What is the current information about most vulnerable categories?

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How are the most vulnerable categories represented in Committees or other instances?

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- What was the degree of beneficiary consultation during inception phase?

⬜ None ⬜ Information ⬜ Listening ⬜ Dialogue ⬜ Collaborative formulation

- What was the foreseen degree of beneficiary consultation for the setting up of the MEAL system

⬜ None ⬜ Information ⬜ Listening ⬜ Dialogue ⬜ Collaborative formulation

**What is the available MEAL budget line?**

|  |  |
| --- | --- |
| Expertise (n° of days) |  |
| Tools |  |
| Website/software/licence: |  |
| Videos: |  |
| Photos: |  |
| Publication/edition: |  |
| Traduction: |  |
| Printing: |  |
| Events: |  |
| Other (please specify): |  |
| Total  | **\_\_\_\_\_\_\_\_\_** *(insert currency)* |

MEAL foreseen budget is \_\_\_\_\_\_\_\_\_\_\_\_\_% of overall budget.

Are decision-making processes modelized?

* For operational decision-making?
* For strategic decision-making?

**Accountability**

Existing reporting framework: frequency, templates

* From programme to donors:
* From programme to local authorities/partners:
* From programme to beneficiaries:
* From programme to other stakeholders:

Is the response format agreed on (frequency, format,…)

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**Evaluation**

Are there external evaluation already planned?

⬜ Mid-term evaluation

⬜ Final evaluation

⬜ Ex-post

Which software are already in use to collect, treat or exchange data?

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**LEARNING**

* To what extent previous evaluation were used to build the actual programme?

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* Scientific journal and press review subscriptions

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* To what extent, data and learning generated by the programme may be limited by copyright or intellectual propriety issues?

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AUTODIAGNOSTIC : color code - green (satisfactory) – orange (intermediate) – red (unsatisfactory)

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| --- | --- | --- | --- |
|  |  |  |  |
| Programme foundation |
| General background understanding  |  |  |  |
| « Most vulnerable category » understanding and delineation |  |  |  |
| Pre-existing data availability and quality |  |  |  |
| Adequate matching between identified need and anticipated support  |  |  |  |
| Clearly defined goals |  |  |  |
| Formalized theory of change/programme intervention (delete as appropriate)  |  |  |  |
| Reference data/initial value of indicators |  |  |  |
| Current configuration of the MEAL system at the date of  |
| Internal consent or inclination for a MEAL system  |  |  |  |
| Internal knowledge and skills in M&E (core team) |  |  |  |
| Stake-holder knowledge and skills in M&E (duty bearers) |  |  |  |
| Grant beneficiaries knowledge and skills in M&E |  |  |  |
| MEAL requirements, expectation, timeline and milestones clearly specified (from donor)  |  |  |  |
| MEAL budget allocation  |  |  |  |
| State of advancement and formalization of the MEAL system (e.g. through an internal guidance note or guideline) |  |  |  |
| Beneficiary participation in the setting up of the MEAL system |  |  |  |
| Decision-making processes configuration  |  |  |  |
| Practical usefulness and uses of existing M&E tool  |  |  |  |

- Please highlight or provide further detail of any strength and limit mentioned above:

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- What would you say, in a nutshell, the major challenges the programme is facing?

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PLAN D'ACTION :

* According to previously mentioned blind spots or weaknesses, which studies or should term expertise should be undertaken?
* ....................................................................................................................................................
* ....................................................................................................................................................

⬜ Diagnostic or blind spot from diagnostic?

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⬜ Theory of change or blind spot from Theory of change?

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⬜ Ex-ante evaluation or blind spot from ex-ante evaluation?

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⬜ Baseline study or blind spots from baseline study

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⬜ Stakeholder analysis or blind spots from stakeholder analysis

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⬜ Any other short-term expertise that may be relevant?

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II. Specifying expectations from the MEAL systeme

HQME: balance points

*The HQME approach (High Quality in M&E) was progressively developed through EVAL ressources center from 12 years supporting organization setting up M&E systems). It is based on various adaptable equilibrium points as the 4 below and 4 compulsory items on next page.*

1. Strike a balance between general purposes of the MEAL system:

When setting up a MEAL system, our goals are about : *(please mark from 1 to 4 according to autodiagnostic)* :

⬜ Developing piloting tools to enlighten decision making

⬜ Accountability to donor

⬜ Accountability to concerned population

⬜ Learn from past failing and in itinere

1. Strike a balance between possible scopes of the MEAL system:

*You may delineate a reduced scope as a start (i.e. a single intervention). Once the process is mastered, you may progressively adapt the scope.*

**The scope of the MEAL system will be:**

⬜ a single intervention

⬜ a project (various interventions)

⬜ a programme (various projects)

⬜ a strategy

⬜ Other (i.e. a specific tool, a geographical area, a partnership, etc.)

1. Strike a balance between programme cycles:

What specific time period the system will focus on?

⬜ Ex-ante ⬜ Mid-term ⬜ Final ⬜ Ex-post ⬜ Global

1. Strike a balance between internal/external perspectives and stakeholders viewpoints

The system will exploit data from:

 ⬜ Autoevaluation ⬜ Internal M&E ⬜ External evaluation ⬜ Beneficiary led evaluation

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

HQME : 4 fundamentals

1. How may final beneficiaries be involved in the setting up of the MEAL system?

*You may delineate a reduced scope as a start (i.e. a single intervention). Once the process is mastered, you may progressively adapt the scope. Beneficiary commitment may be distinct according to the various scope delineated above (question 2)*

⬜ Information ⬜ Single Consultation ⬜ Ongoing dialogue ⬜ Joint elaboration

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1. What additional resources may be required to develop, install and implement the MEAL system?

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3. What is the degree of latitude for innovative, atypical or informal tools (making it possible to capture any trace of the action through any means of expression*)? Is the programme in an enabling environment for creative or innovative MEAL tools? Or an substantial administrative or legal framework that will leave little space for alternatives and encourage to conform to the norm?*

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4. How will the monitoring of the system be integrated into the programme management?

*(specify at least 4 annual point (seminar HQME1, 2, 3 and 4: e.g. integration into already planned event as steering committee meetings, team meetings, annual seminar) or HQME exclusive events)*

Developping evaluation questions

*Select 5 criteria on which will be developed evaluation questions. You may select in this section the criteria/evaluation questions that will be presented on seminar HQME1. Presentations during HQME seminar do not necessarily answer evaluation questions but show progress in the design of data collection tools or data collected.*

□ **Relevance**: to which extent the intervention corresponds to the need and expectation of beneficiaries at territorial level?

□ **External coherence**: *consistency of the intervention with other actors’ interventions in the same context*

□ **Internal coherence**: *synergies and interlinkages between the intervention and other interventions carried out by the same institution/government, as well as the consistency of the intervention with the relevant international norms and standards to which that institution/government adheres.*

□ **Effectiveness:** is the intervention achieving its objectives?

□ **Efficiency:** is the intervention achieving its objectives? How well are resources being used?

□ **Impact:** what difference does the intervention make?

□ **Sustainability:** will the benefits last?

□ **Acceptance:** to what extent is the intervention accepted?

□ **Ownership:** to what extent is the intervention have local ownership?

Target population fidelity

□ **Most vulnerable categories:** what data is available concerning most vulnerable categories whether from direct beneficiaries or indirect beneficiaries?

□ **Coverage:** what is the territorial coverage of the intervention?

□ **Equity**

□ **Partnership**

□ **Intensity/dosage:** is the level/volume of activities large enough to achieve the expected effect?

□ **Progress:** capacity to identify positive trends even when results are not met

□ **Timeframe:** when is the most appropriate timeframe for the intervention to be undertaken?

□ **Ressource captation:** will human or material resources required to run the intervention be withdrawn from another public utility service?

□ **Reactivity:** capacity of an intervention to adapt to an evolving situation

□ **Tool, equipment, process assessment:** were selected tool, equipment or processes appropriate to run the intervention?

□ **Organizational capacity**

□ **Team cohesion**

□ **Governance**

□ **Transferability**

Transversal criteria

□ **Gender equality and equal opportunities**, needs of disabled people, rights of minorities

□ **Social**: do the implementer or partners align with internationally agreed norms for social responsibility

□ **Environment**: may the intervention have a negative environmental impact?

□ **Relevance to the Sustainable Development Goals:** insert the most relevant SDG target(s) to which the project contributes

 □ **Temporal window:** when would the intervention ideally starts starts and what would be the risk for the action to become obsolete in case it was delayed?

□ Other criteria?

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**Transform into evaluation questions, selected criteria above.**

*A same criteria may be declined and outlined in multiple subquestions.*

*Question 1(sample)*

□ **External coherence**: *consistency of the intervention with other actors’ interventions in the same context*

*How does the intervention fits with other pre-existing intervention in the area?*

*To which extent is the intervention complementary, harmonized and coordinated with other actors? What is the perceived added-value or specificities of the programme? Is there any area where duplicated efforts can be found?*

*What are the specific consultation, collaboration, partnership mechanisms, at the regional, national or local level?*

*Question 2 (sample)*

□ **Sustainability**: will the benefits last?

*To what extent the benefits of the intervention are likely to continue? To what extent is there a discernible beneficiary commitment to pursue the intervention? Are technical choices (equipment, software, hardware, simple maintenance and installation, level of proficiency…) likely to encourage long lasting effects?*

□ **Acceptance**: to what extent is the intervention accepted?

□ **Ownership**: to what extent is the intervention have local ownership?

*Question 3 (sample)*

Target population fidelity

*To what extent the programme benefits targeted beneficiaries? How many beneficiaries were assisted by the programme? How many beneficiaries were assisted by the programme? How many came from the target population?*

□  **Most vulnerable categories**: what information is available concerning most vulnerable categories ?

□ **Coverage**: what is the intended territorial coverage of the intervention?

*To what extent inequalities and discrimination may affect access to and quality of service (in term of gender, age, language, religion)?*

*Question 4 (sample)*

**Environment**: may the intervention have a negative environmental impact?

**Formulate 2 evaluatives questions out of the logic model:** *this is about questioning causal links of the logic model, detecting the weakest or more uncertain links of the projection:**i.e. : is product or service X producing expected effect Y ?is short term effect Y producing mid-term effect Z?*

*Question 5*

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*Question 6*

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**Formulate two evaluative question out of the assumptions/external factor component of the logic model** *(i.e. to what extent the anticipated external factor X actually affected the intervention?)*

*Question 7*

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*Question 8*

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Beyond informing decision making, what may be the consequences (positives or negatives, intended or unintended, direct or indirect) of answering evaluation question (in terms of continuing funding, human ressources or team management, etc.)

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III. Selecting methods

Which methods could be used to answer evaluation questions?

*Please first give a general view on the suitability of each method in your context then fill the table below for specific considerations of each evaluation question independently.*

* Result based approaches and Logical framework matrix ⬜ Yes ⬜ No ⬜ ?
* Outcome mapping ⬜ Yes ⬜ No ⬜ ?
* Most Significant Change ⬜ Yes ⬜ No ⬜ ?
* Randomized Controlled Trial ⬜ Yes ⬜ No ⬜ ?
* Monographic study ⬜ Yes ⬜ No ⬜ ?
* Capitalisation of experience ⬜ Yes ⬜ No ⬜ ?
* Action research ⬜ Yes ⬜ No ⬜ ?

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| **Evaluative questions (please paste previously elaborated evaluation questions bellow)** | **Selected method** | **Comments** |
| Question 1  |  |  |
| Question 2 |  |  |
| Question 3 |  |  |
| Question 4 |  |  |
| Question 5 |  |  |
| Question 6 |  |  |
| Question 7 |  |  |
| Question 8 |  |  |

⬜ What others methods could be considered?

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⬜ Figure libre? *These are internally designed or customized methods available for testing.* ......................................................................................................................................................................

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In a pragmatic way, according to the MEAL budget, capacities, timeline, what combination of methods will be used?

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Selection of key indicators

Quantitative indicators

Elaborate up to 12 key indicators that will address/cover the as much as possible the full scope of the MEAL system (page 11).

According to the topics covered on HQME1, the same exercice and key indicators may be selected per each evaluation questions.

*Indicators are to be presented bellow as METRICS, this is without targets (i.e. “proportion of marine areas protected” and not “proportion of marine area protected increase by x%). Selection of indicators and selection of targets are two crucial steps that should be undertaken separately.*

* **Context indicators**
* **Process indicators**
* **Results indicators**
* **Effects indicators**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Context | Ressources | Process | Results | Effects |
|  |  |  |  |  |

Impact and effects indicators (medium to long term change)

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Outcome indicator (changes resulting from the action)

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Output indicators (direct/tangible infrastructure, goods and services)

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Process (activities)

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Ressources

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Qualitative indicators

What domains of change do we want to assess? *(i.e. “sustainable fishing practices”, “preparedness to face a pandemic”, “reduce the use of bleach and other harsh chemicals to treat cesspits and septic tanks”)*

**Who are the key decision makers for change to happen?** *(i.e. fisher association for the domain of change “sustainable fishing practices”)*

Domain of change n°1: …………………………………………………………………….……….

Key decision makers: .......................................................................................................................

Domain of change n°2: ………………………………………………………………………….….

Key decision makers: .......................................................................................................................

Domain of change n°3: ……………………………………………………………………………..

Key decision makers: .......................................................................................................................

For each domain of change, elaborate progress markers: precise a starting point or unsatisfying situation and from there, what is the minimum change expected, what is clearly expected and how would the ideal situation look like. You may exercise below with 3 key decision makers for a single domain of change or 3 distinct domains of change.

|  |
| --- |
| Domain of change n°1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Key decision maker: (to facilitate readibility : only one key decision maker per table ) |
| Unwanted | Minimum expected | Clearly expected | Ideal |
|  |  |  |  |

|  |
| --- |
| Domain of change n°2: Key decision maker:  |
| Unwanted | Minimum expected | Clearly expected | Ideal |
| 1. | 2. | 3. | 4. |

|  |
| --- |
| Domain of change n°2: Key decision maker:  |
| Unwanted | Minimum expected | Clearly expected | Ideal |
| 1. | 2. | 3. | 4. |

Capitalizing from experience and Knowledge-management

How will be documented the different steps of the intervention? Is there an internal culture of learning from failure? How will knowledge be captured, organized and circulated?

⬜ guidelines, manual

⬜ peer review

⬜ factsheets

⬜ best practice database

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Figure libre

Beyond previously formalized indicators, what are the signs, observations and feedback that provide you with daily information on the progress of the action?

Formal.................................................................................................................................................................................................................................................................................................................................

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Informal..........................................................................................................................................................

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IV. Data collection and processing

*Please paste here a blank Indicator Tracking Table according to selected key indicators from page 19.*

How will data be collected (multiple choice)?

*You may further differentiate through a color code*

* *Existing data collection tool developed for the programme (yellow)*
* *Existing data collection tool developed for the programme that will be refined (i.e. adding SED) (orange)*
* *Data collection tools that need to be fully developed (green)*

|  |  |
| --- | --- |
| [ ]  Direct observation (informal) | [ ]  Outcome mapping workshops (selecting progress markers) |
| [ ]  Structured observation (observation checklist) | [ ]  Most Significant Change workshops  |
| [ ]  Individual interviews (unstructured) | [ ]  Printed questionnaires  |
| [ ]  Individual interviews (interview grid) | [ ]  Online questionnaires  |
| [ ]  Focus group (groupes de discussion) | [ ]  Logbook, activity register |
| [ ]  Other: | [ ]  Other: |

According to selected data collection tool (above), please complete where appropriate:

[ ]  1. Observation :

How often will the field visits take place?

Will the filed visits be scheduled or unannounced?

[ ]  Peer observation *(i.e. teacher observe teacher, nurse observes nurses* [...])

What will be the main fields of observation?

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[ ]  2. Individual interviews

What will be the sample size? ........................................................................................................................................

Will it be single interviews or repeated interviews? If repeated, how often will the interviews take place?.......................................................................................................................

Will interviews be: [ ]  Unstructured [ ]  Semistructured [ ]  Structured

[ ]  3. Focus group:

Who is our target respondent?

How often will the focus group take place?

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What topics are to be covered?

[ ]  4. Workshops (Most Significant Change or Outcome Mapping):

Who is our target respondent?

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How often will workshops take place?

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Will domains of change be pre-identified? (MSC)

Which domains of change will be selected to define progress markers or precondition for change to occur?

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[ ]  5. Questionnaires:

Who is our target respondant?.....................................................................................................................

Is it feasible to interview all beneficiaries?

[ ] Yes [ ]  No⬜ ? If not feasible, what proportion of beneficiaries will be interviewed?

[ ]  If printed questionnaire [ ]  Face-to-face *or* [ ]  Self-administered

[ ]  If online [ ]  web bases *or* [ ]  Mobile application

-Frequency:

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- What response rate would you consider as satisfactory?

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- What are the potential bias? How the question design or administration yield inaccurate results?

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For each data collection tool selected above, please specify:

|  |
| --- |
| Data collection tool n°1 : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| * Who is in charge for developing the tool? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Who is in charge for data collection? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What resources are needed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
 |
| Data collection tool n°2 : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| * Who is in charge for developing the tool? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Who is in charge for data collection? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What resources are needed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
 |
| Data collection tool n°3 : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| * Who is in charge for developing the tool? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Who is in charge for data collection? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What resources are needed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
 |

…

Dynamic M&E

- What position for a Dynamic M&E?

- How to not only follow but also guide and maximize impact through data collection tool?

- What kind of information, data, guidance and outreach may be provided through data collection tools?

*Please provide specific examples.*

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- Is **data collection** manageable internally? [ ]  Yes [ ]  No

- Is **data treatment** manageable internally? [ ]  Yes [ ]  No

- Is **data analysis** manageable internally? [ ]  Yes [ ]  No

*Information watch:*

Primary data *(first hand sources)* [ ]  Yes [ ]  No

Data sources: ............................................................................................................................

Secondary data *(existing data collected from external organization)*: [ ]  Yes [ ]  No

Data sources: ................................................................................................................................

- Figure libre

How to capture any impression left by the intervention? Apart from data collection methods mentioned above, any alternative or innovative way to harvest intervention effects?

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ACTION PLAN:

Design of data collection tools

- According to the data collection instruments selected above, what tools have to be refined or developed? *(please use the same color code as above – yellow: exiting – orange: to refine, green: to be fully developed)*

[ ]  Observation grid or checklist

[ ]  Interview grid

[ ]  Focus group facilitation card

[ ]  Outcome Mapping facilitation card

[ ]  Ladders of progression (domain of change + progress markers)

[ ]  Most Significant Change facilitation card

[ ]  Story collection form

[ ]  Printed questionnaire

[ ]  Online questionnaire

[ ]  Logbook/register

[ ]  Other :\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Step 5: Planning the use, utility and dissemination of results

Organize programme level monitoring and planification of evaluations

What will be the information flow (transmitters and receivers)?

How often is the indicator tracking table is to be actualized?

What will be the main data formats? (please specify the exact title as “quarterly report”, “mid-term evaluation”, and the responsible authority for data production)

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- Is the data public and freely accessible: [ ]  Yes [ ]  No [ ]  Partially

- Is there confidentiality or privacy issues: [ ]  Yes [ ]  No

- If so, please describe:

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**Feedback**

- Will feedback workshops be organized to presents the findings? [ ]  Yes [ ]  No

- Who will attend? .......................................................................................................................

Frequency/number of workshops:  ...............................................................................................

- How will the right of reply be organized for evaluated interventions?

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**Distribution format and dissemination strategy**

- How will the findings be shared?

⬜ Photographs

⬜ Video-based evaluation

⬜ Data vizualisation

⬜ Cartography and Geographic Information Systems

⬜ Other forms of artistic expression (painting and drawing, street art, performing, humor…)

- Please explain as needed:

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- What will be the means of communication?

⬜ Social network

⬜ Newsletter

⬜ Annual report

⬜ Database

⬜ Website

⬜ Others:

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**Developping recommendations and decision making process**

Is the decision-making process effective and clearly established? What is the path that will allow a finding/recommendation to be transformed in decision/programme orientation? Can this path be modelled or visualized? *(see below)*

- Operational recommendation

*Please paste bellow a simple graph that illustrates the decision-making pathway for an operational recommendation (i.e. modifying an activity)*

**

- Strategic recommendation

*Please paste bellow a simple graph that illustrates the decision-making pathway for a strategic recommendation (i.e. a policy reorientation or adjustment)*

**Early recommendations**

*While we are almost terminating this action plan, did any recommendation already emerged at this point? Please list below a recommendation (or alertness standpoint, weak point to be monitored) one at an operational level and another one at a strategic level:*

1..................................................................................................................................................................

2................................................................................................................................................................

- Development of a follow-up timetable for approved recommendations: [ ]  Yes [ ]  No

- What financial resources will be available to implement recommendations?

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Finalisation of the Action Plan

How will the information and recommendations from the Action plan effectively communicated and disseminated?

⬜ Meeting

⬜ Presentation/workshop

⬜ Training course

Please specify (title, duration, etc.):

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How will the recommendations from the action plan effectively transformed into orientations and decisions?

⬜ Short MEAL Guidelines

⬜ MEAL Manual

⬜ Memorandum

⬜ Terms of Reference

⬜ Minutes

⬜ Other:

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Please specify:

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**Please paste bellow the MEAL timeline**

*The MEAL timeline/calendar shall incorporate milestones and deadlines for all MEAL related activities: HQME seminars and workshops, MEAL trainings, mid-term or final evaluation, administering and processing questionnaires, field visits, reporting periods,…)*

*You may paste bellow any complementary attachments.*

- MEAL provisional budget

- MEAL graphic representation

- Infography/Data vizualisation

- Cartography and Geographic Information Systems

- Photographs/before and after images

- Video-based evaluation

- Evaluation charter/internal norms

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Thank you for your dedication and perseverance!