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tools4dev HOW-TO GUIDE:

How to write a monitoring and evaluation framework

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tools4dev provides templates, reviews and how-to guides for international development professionals and aid workers. Find out more at www.tools4dev.org

How to write a monitoring and evaluation (M&E) framework

Note: An M&E framework can also be called an evaluation matrix.

One of the most popular downloads on tools4dev is our [M&E framework template](#). We've had lots of questions from people on how to use specific parts of the template, so we've decided to put together this short how-to guide.



An M&E framework is *one part* of an [M&E plan](#), which describes how the whole M&E system for the program or organisation works. If you need to write a full M&E plan for one or more projects see our [M&E plan template](#).

Choose your indicators

The first step in writing an M&E framework is to decide which indicators you will use to measure the success of your program. This is a very important step, so you should try to involve as many people as possible to get different perspectives.

You need to choose indicators for each level of your program – outputs, outcomes and goal (for more information on these levels see our articles on [how to design a program](#) and [logical frameworks](#)). There can be more than one indicator for each level, although you should try to keep the total number of indicators manageable.

Each indicator should be:

- Directly related to the output, outcome or goal listed on the problem tree or logframe.
- Something that you can measure accurately using either qualitative or quantitative methods, and your available resources.
- If possible, a standard indicator that is commonly used for this type of program. For example, poverty could be measured using the [Progress Out of Poverty Index](#). Using standard indicators can be better because they are already well defined, there are tools available to measure them, and you will be able to compare your results to other programs or national statistics.

Here is an example of some indicators for the goal, outcome and output of an education program:

Goal

10% increase in the number of Grades 6 primary students continuing on to high school within 3 years



Indicator

Percentage of Grades 5-6 primary students continuing on to high school

Outcome

Improve reading proficiency among children in Grades 5-6 by 20% within 3 years



Average reading proficiency among children in Grades 5-6

Output

1. 500 Grade 5-6 students with low reading proficiency complete a reading summer camp



Number of students completing the reading summer camp

Some organisations have very strict rules about how the indicators must be written (for example, it must always start with a number, or must always contain an adjective). In my experience these rules usually lead to indicators

that are convoluted or don't make sense. My advice is just to make sure the indicators are written in a way where everyone involved in the project (including the donor) can understand them.

Define each indicator

Once you have chosen your indicators you need to write a definition for each one. The definition describes exactly how the indicator is calculated. If you don't have definitions there is a serious risk that indicators might be calculated differently at different times, which means the results can't be compared.

Here is an example of how one indicator in the education program is defined:

Indicator

Percentage of Grades 6 primary students continuing on to high school.

Definition

Number students who start the first day of Grade 7 divided by the total number of Grade 6 students in the previous year, multiplied by 100.

Sample calculation

$$\frac{80 \text{ students start the first day of Grade 7 in 2013}}{175 \text{ Grade 6 students in 2012}} \times 100 = 46\%$$

After writing the definition of each indicator you also need to identify where the data will come from (the "data source"). Common sources are baseline and endline surveys, monitoring reports, and existing information systems. You also need to decide how frequently it will be measured (monthly, quarterly, annually, etc.).

Measure the baseline and set the target

Before you start your program you need to measure the starting value of each indicator – this is called the “baseline”. In the education example above that means you would need to measure the current percentage of Grade 6 students continuing on to Grade 7 (before you start your program).

In some cases you will need to do a survey to measure the baseline. In other cases you might have existing data available. In this case you need to make sure the existing data is using the same definition as you for calculating the indicator.

Once you know the baseline you need to set a target for improvement. Before you set the target it's important to do some research on what a realistic target actually is. Many people set targets that are unachievable, without realising it. For example, I once worked on a project where the target was a 25% reduction in the child mortality rate within 12 months. However, a brief review of other child health programs showed that even the best programs only managed a 10-20% reduction within 5 years.

Identify who is responsible and where the results will be reported

The final step is to decide who will be responsible for measuring each indicator. Output indicators are often measured by field staff or program managers, while outcome and goal indicators may be measured by evaluation consultants or even national agencies.

You also need to decide where the results for each indicator will be reported. This could be in your monthly program reports, annual donor reports, or on your website. Indicator results are used to assess whether the program is working or not, so it's very important that decision makers and stakeholders (not just the donor) have access to them as soon as possible.

Put it all into the template

Once you have completed all these steps, you're now ready to put everything into the [M&E framework template](#).

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