Monitoring & evaluation framework template

1. INTRODUCTION

Here's where you introduce your Monitoring and Evaluation framework (M&E framework). The introduction sets the context for the document, so include whatever is relevant to your organisation and program.

Typical contents might include:

> the purpose of the framework
> the scope of the framework
> the functions and content of the framework
> any limitations.

Purpose

Scope

Structure

Limitations

Acknowledgements

2. ABOUT THE PROGRAM

This section explains the context of the program and looks at any issues that may impact M&E activity.

It should also define the program objectives and detail the program theory and program logic. (Read: **Program Theory and Program Logic: Articulating how your program works for steps on how develop a program theory**).

This section should help in bringing newcomers up to speed about the program, including staff, evaluators and other stakeholders.

Background to the program

Program theory/program logic

3. APPROACH TO EVALUATION

This section of the M&E framework details the upfront planning for your program's evaluation activities. (A second more detailed planning phase is likely to be required just before each evaluation activity starts, with the more detailed approach documented in an **evaluation plan**).

For each evaluation activity you should identify:

> the purpose – what management decisions does it need to inform?
> the scope – what will be assessed? (One way to define scope is by using Key Evaluation Questions)
> how the evaluation activity will be resourced
> when the evaluation should occur.

Evaluation activity (repeat for EACH evaluation activity, e.g. monitoring + formative evaluation + summative evaluation)

(Eg: Implementation evaluation, summative evaluation, etc. Refer to Types of program evaluation for further explanation).

Purpose

Scope

Timing

Resources and budget

4. MONITORING APPROACH

Performance monitoring is the ongoing collection of performance data.

It helps you identify any areas not performing to expectations and determine whether any adjustments to the program are needed.

In this section, you should briefly outline the routine monitoring needed to assess how your project is progressing. You need to identify:

> the performance measures that are appropriate to your organisation and program
> the management reporting required.

You can refer to our article on **performance monitoring** to help you identify the factors you need to consider.

Key Performance Indicators (KPIs)

The proposed KPIs are found below:

#	KPI	TARGET MEASURES	TARGETS
1			
2			

Reporting

The proposed reports will include:

REPORT	KEY CONTENTS	FREQUENCY	RECIPIENTS

5. DATA COLLECTION

In order to make the data work for you, you need to have a think about:

> what data will you need for your program evaluation and monitoring activities?
> how will you collect it?
> how long will it take to collect?

Depending on the data you need and the questions you're seeking to answer, there may be a significant time-lag before your data becomes available for analysis.

The framework should detail key aspects about the data collection approach, such as:

> who is responsible
> details of the data to be collected
> the source of the data
> how data will be collected.

This information can be summarised in a table format. See two different examples below.

KEY EVALUATION QUESTION	ANALYSIS	DATA REQUIREMENTS	DATA SOURCE	COLLECTION METHOD
List each of your key evaluation questions in a separate row of the table. To keep the scope of your evaluation practical limit the number of key evaluation questions to no more than five.	Detail what approach (or approaches) you will use to assess this key evaluation question.	What data do you need to support your analysis? List your data requirements such as: demographic data of the target groups, uptake, feedback on ease of use, etc. The data requirements will be specific to each program and each evaluation.	Where will you get the data? Sources of data might be administrative systems, publicly available reports or data sets, stakeholders, etc. Try grouping the data by source to streamline the matrix.	How will you get the data? Face to face interviews, surveys, reports extracted from a system, documentation request…. Don't forget to identify the volume of data collection, if relevant. For example, how many interviews: 10 x 1 hr face to face interviews.

DATA REQUIRED	DATA SOURCE	DATA COLLECTION METHOD	RESPONSIBLE FOR COLLECTION

TIP! If you need help planning your data collection or aren't sure what types of data or methods to use get the low down **here**.

6. ETHICS APPROACH

Set out how you will manage any ethical considerations for your monitoring and evaluation activities, including whether you will be engaging with at-risk or vulnerable populations. Even if you are not conducting high risk activities you should still consider as a minimum how informed consent will be achieved, how engagements will be undertaken, how information will be managed and secured (and eventually destroyed) and how confidentiality will be maintained.

If you're not sure where to start look at the following resources:

> the **National Statement on Ethical Conduct in Human Research 2023** (National Statement)
> **AES Guidelines for the Ethical Conduct of Evaluations**

in addition to any sector-specific or cohort-specific guidelines which may apply to your context.

7. OTHER CONTENT POSSIBILITIES

The content you include should be tailored to your needs and to your program.

You may want to consider including other content such as:

> **stakeholder analysis** – include details of the program stakeholders, their roles and engagement in monitoring and evaluation activities
> communication strategy – if your program has a communication strategy, consider how it interacts with the monitoring and evaluation activities as well as how it could be leveraged to collect data. Don't forget to consider how you will **communicate** the monitoring and evaluation results
> risk management – outline the risk management approach for the program and consider the risks associated with the monitoring and evaluation activities
> compliance strategy – some programs have a compliance regime. It is important to consider if a compliance regime is necessary and how it will interact with the evaluation and other program delivery activities
> governance – who are the decision-makers and approvers for the evaluation activities? Who will be receiving the reports, and what actions will occur post-acceptance? It is helpful to map this out using diagrams where required for a complex governance structure
> learnings – how the learnings from the evaluation activities will be consolidated, shared and used more broadly across your organisation to improve its programmatic practice
> data collection tools – you may include draft questions for consultations or surveys, or templates for collecting monitoring and reporting data in, as appendices to the framework.

Need more help?

Got questions about this template or need a little more help to develop your M&E Framework?

Contact our program evaluation team for an informal chat about how we can help!

Web: **https://www.grosvenor.com.au/public-sector-advisory/program-evaluation/**