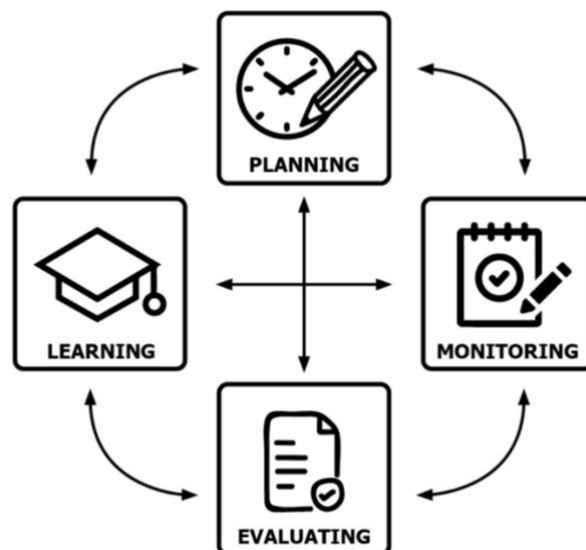


BAP's PMEL: Planning – Monitoring – Evaluating – Learning

We often feel intimidated by the words “monitoring and evaluation” (M&E) and feel frightened by it, like it is a testing of our work or of our competence. Most of us don't realise we are doing M&E in all our work all the time. PMEL helps your workflow, it isn't a test. To demystify the concepts of PMEL, the following pages define what the words mean in simple terms, in an organisational context.



Planning: This is normally a detailed proposal (or suggestion / draft) for doing or achieving something that is still to happen. When you plan, you are deciding on actions in advance. A plan is your decision about what, how, and when you are going to do something in the future. It's a guide for the way forward.

An example in a training programme or project is that you plan how many training modules you are going to run in the coming months, quarter or year, how many participants to be recruited into each module, who will train, the dates and at what time/s. These are all the basic things you plan so that you do not work in chaos and so that you can deliver an effective capacity building service. Having a plan also gives you something to check against when you monitor and evaluate if you achieved what you aimed to.

Monitoring: This is when we pause, look and check the progress, quantity &/or quality of something. For example, you check on work progress at intervals to see if plans are on track. Information you get from monitoring tells you where things are going well and where the challenges are so that you can make needed adaptations. Monitoring gives you information about whether you will reach your planned targets if you continue doing things the way you are. Monitoring can also tell you when to change your original plans because they were maybe not realistic to start with; or no longer effective because circumstances have changed since the original plans were made.

An example in a training programme or project is that you monitor the past month of training and realise that a particular session had low attendance, you check with some of the absent participants and find out that that particular session clashed with a Child Case Study Hub; you now check for possible clashes more carefully in the organisation's calendar and schedule training more mindfully going forward. Alternatively, you would know to inform participants before the time that there is a clash and assure them that they may attend the next hub; but to prioritise the training session in order to meet the training requirements.

Evaluating: Generally, if you evaluate something you are assessing it in order to make a judgment about it, about how good or bad it is or how effective or not something is. Evaluation can take place at any stage in a project or programme's cycle, but most often it takes place at the end of a project, after a specific time period, at the end of a planned task, at the end of a funding cycle etc. A formal evaluation is an in-depth investigation by an independent person into an organisation's ability to deliver outputs, checked against its plans and usually also includes an element of impact assessment. Impact assessment simply means checking if your activity made the envisaged positive difference or change for/in your beneficiaries.

An example in a training programme or project is using a pre- and post- module assessment tool to find a measure of change in the participants' level of understanding of or skill in the training topic that was covered. At the beginning of the training the participants rate their own levels of understanding / ability on the topic before the training starts. At the end of the training the participants rate their levels again, using the same questions. This comparative data informs if the training made a positive change, you will know what percentage of the participants have increased capacity due to the training.

Learning: This is when we gain knowledge about something by studying it or experiencing it. In terms of PMEL, learning is when you reflect on the information and data you gathered in your monitoring and evaluation. By reflecting, you are taking time to review and debrief, to list your lessons learned (this is gained knowledge). These lessons learned inform your next steps of planning so that you can be more organised, more effective and do things even better in the future.

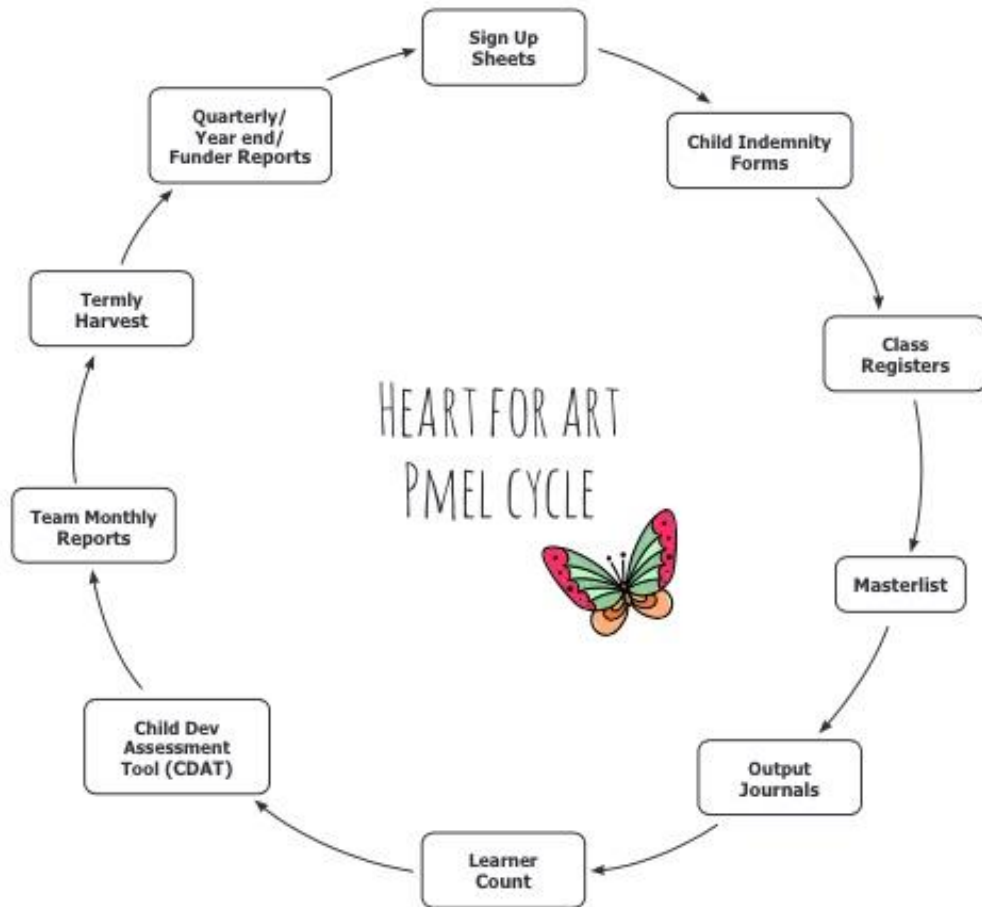
An example in a training programme or project is that through reflection (such as in a team discussion about the implementation achievements and challenges over the past 3 months) you note that there were more applicants than usual for a particular training module, that there is a waiting list. You can suggest a second class of that same training module and discuss in the team; or what to offer those CAFs on the waiting list as an alternative. Another lesson learned is that that particular training module is meeting a bigger need than originally envisaged and should possibly be offered again soon.

Butterfly Art Project's PMEL: We have PMEL processes and tools for all our adult training and mentoring activities as well as our work with children through our Art Centre in Vrygrond, Heart for Art. Over the past 10 years the organisation has been developing, testing and refining its PMEL tools.

For the purposes of this information resource, **the following example describes how PMEL takes place at Heart for Art** (BAP's extra-curricular programme):

The community art facilitator **plans** her term 1 classes for grade 4. She designs an art project for them, she **plans** 8 art lessons where the children will ultimately create a big group clay mandala. One week into the term, she has a class register and lays the foundation to her **monitoring and evaluation** steps by setting the baseline for each child in her class using the Child Development Assessment Tool (CDAT). Using the tool, she rates every child's general, creative and emotional development as well as social interaction skills. After every lesson she writes an output journal, reflecting and noting how the class went, what the successes and challenges were, also noting what the way forward is with the class and why. This **monitoring** process informs her about the best way forward with the coming lessons (for example, does she need to change something she planned due to unforeseen circumstances such as the school day being shortened due to community unrest). During the term she also writes 2 monthly implementation reports for her manager (she uses her output journals as her main resource). In this report she lists what her **plans** for the month were, she describes what she achieved, how many children she taught, how many lessons took place, what went well and didn't go well and why. She also includes what was not achieved (according to what the plan says should have been done during the reporting period). At the end of the report, she includes what her **plans** for the following month are (these **plans** are what her next monthly report will speak to). At the end of the term, she assesses every child again and gives them another rating in each of their Child Development Assessment Tool (CDAT) categories. By doing this, she is **monitoring and evaluating** the stability levels of the children in her class. Also, at the end of the term, she and her fellow Heart for Art CAFs have a "harvest" where they reflect together and **evaluate** how the term went. They talk about everything that worked, everything that didn't, they talk through what can be done better and how, they also talk about the outcomes of their CDAT assessments and what impact they are (or not) having on children, this is their **learning**. Based on these discussions, they plan for the next term together, also referring to the plan they made for the year as the bigger picture. The Heart for Art manager writes up their reflection process, their lessons **learned** and uses these with the team's monthly reports to write comprehensive funder reports, including the **plans** for the next implementation period.

The following lists the basic tools that are utilised in Heart for Art's PMEL cycle. Some tools are used more often than others, for example: class registers and output journals are used for every class/lesson (up to eight times in a term/quarter). All the tools have been listed in the general order in which they are used by the team. Each square represents a tool. If you go to BAP's website you will find all the templates for these various tools: <https://www.butterflyartproject.org/h4apmel>



Sign Up Sheets: (Planning)

At the beginning of the school year BAP visits classes at the local school/s to “market” the art classes on offer for each grade or age group. This recruitment also takes place as a periodic “open day” where the team sets up a table accessible to the local community where parents and children can engage with BAP and sign up or take sign up sheets away with them for later submission. These sheets provide the reader with basic information about Heart for Art and BAP and is a tool for gathering information about the child who would like to be a beneficiary. The sheets also allow the children to choose in which art class they want to be, this information will then be used to slot the children into the different art classes by the team.

Child Participation Consent and Indemnity Form: (Planning)

These forms are distributed with sign up sheets. These forms give BAP all the basic information about each applicant child, including information about their parent/guardian. The form also informs parents and children about BAP’s roles and responsibilities while the child is in the Heart for Art class. It explains too that BAP uses photographs on public platforms and ensures that parents give BAP permission to utilise these photos without compensation. The form also indemnifies BAP of responsibility for incidents beyond its power.

Class Lists: (Planning)

The team sifts through all the sign-up and indemnity documents. There is usually an oversubscription; so, the team uses their experience to ensure that children get a fair turn to be in a class, ensuring that not only the same children are enrolled into Heart for Art each term/year. This planning informs the team about how many classes can be hosted in the building, that all the classes have a lead facilitator and assistant. Class lists also show the team how many lesson plans are

needed, they then decide who will be responsible for writing them.

Class Registers: (Monitoring)

Class registers capture information of the children that are in each specific class. These registers are used to check the attendance of children each week. This tool informs the programme’s learner count of the week. Class registers enable the facilitators to immediately identify where possible intervention is required with regards to attendance. If a child misses 2 consecutive classes without a valid reason, that child might lose their place in the class to make room for another who is more committed to the programme.

Masterlist: (Monitoring)

The masterlist is a compilation of all the children in the Heart for Art programmes. This list enables the team to see all the general information of the children in one place, a quick navigation guide when looking for beneficiary information. The Masterlist has all the details that the individual class lists have, but in one database and contains more than the basics. Each year a new Masterlist is created because of the new intake of children, when a child joins during the year their details are added to Masterlist.

Included in the Masterlist are links that take the reader to other documents relating to the child's progress such as their CDATs. Engagements with the children’s parents/guardians can also be found in the Masterlist. At BAP we have a dropdown menu that captures engagement categories including the means of communication and the reason for the contact. This communication data is helpful to keep track of parent/guardian involvement which can also be included in reports to funders.

Output Journals: (Monitoring & Evaluating)

These short journals enable the art facilitator and assistant/s to capture their thoughts of the class immediately afterwards, while it is fresh in their minds. The document informs the reader of the set up of the classroom and what materials were needed. The journals also capture the challenges and highlights of the lesson and can be used to make special mention of a child they believe needs further support (they could be part of a weekly Child Case Study Hub). The document is a resource to the facilitator with all the information they need for writing their implementation report each month. When a facilitator is absent, the output journal helps the stand-in facilitator catch up quickly on what happened in the previous class and informs about the plans going forward.

Learner Count: (Monitoring)

The document is exactly as the title implies, it is a working document that captures the overall number of children that attended all classes each week, month, term, year. This count helps the team to regularly monitor and see that they are reaching the required number of beneficiaries that were envisaged and proposed to supporters. In working with this document, they can capture the overall number of child engagements they have achieved in any time period such as every week, every term or the year. This tool has been set up so that the average number of children and engagements can be monitored at any time, informing the team if they are on track (according to their plan) and serving the maximum number of beneficiaries they can.

Child Development Assessment Tool (CDAT): (Planning, Monitoring, Evaluating & Learning)

This tool assesses each child beneficiary's level of general, artistic, emotional and social interaction stability. The aim is to have and measure stability levels in children, rather than seeking major progress, as the foundation of impact. Only when a child is stable, despite the instability of the world they are in, can they have the mental space and general ability to learn, flourish and progress. At the beginning of each year, quarter or term the class's art facilitator and assistant/s assign a baseline measure (numbered 1-6) for every child in their class. At the end of a certain time period (such as after each school term for example) every child is assessed again against the same criteria and given a measure again from 1-6.



The results are that every child then has comparative data that informs the art facilitator about the levels of stability in that child. Of course, human beings are not just data and there are many nuances to consider but experience shows this tool gives a good and reliable indication of stability levels. The tool provides space for facilitators to add comments because factors such as a death in the family or a violent crime in the home are factors that may result in a child not being stable in a certain assessment area at a certain time.

Monthly Implementation Reports: (Planning, Monitoring, Evaluating & Learning)

This is a detailed report by the facilitators about the work and activities that took place in the month. Here they capture the highlights and challenges of every class they teach and include some observations that lead to impact assessment. This tool is also used to document other factors that affect work outside of the classroom, including commending a colleague for work well done or having to report about poor work performance. The report is used to inform managers of the activities that took place at an implementation level. Management use the report to feed back to the implementation staff on work well done, guide sharing &/or finding solutions to challenges and provide a source of reference for all short term and long-term planning. These reports are perfect resources for managers to write up their reports, especially those to boards/committees and funders.



Quarterly/Termly Harvest: (Evaluating & Learning)

This is a celebration event for the team at the end of a school term or any other appropriate time to reflect on and learn from the work that has taken place. They discuss the lessons learnt, the highlights and challenges. These harvests are an opportunity of the team to reflect and discuss how they can improve on or sustain the work. Part of the harvest process is the team looking at the artwork that has been created by the children and identifying those that should be on exhibition in the future (in terms of PMEL, remember that the artworks themselves are proof of the planned activity took place and its outcome). The harvest is not a formal platform and is a safe and relaxed space. The manager takes notes as the information feeds into funder reports.

Reports: (Planning, Monitoring, Evaluating & Learning)

The following elements should be included when compiling an informative report: Heart for Art lets its funder/s and or committee/Board know about any changes in the organisation, team &/or implementation (and explain why). They give them an overview of what was achieved since they reported to them last and remember to link this to the targets they set when they proposed to them in the first place. They share the highlights and lessons learned over the reporting period, describing everything that is important. Reports include how the team have been monitoring and evaluating their implementation and informs about what the plans are for the next period, what the way forward is. Finally, the financial aspects are covered and a concluding thanks for support.