MONITORING

Figure 9. Monitoring Group Learning and Counseling

MONITORING

TO DO

- **Decide** what information to collect
- **Identify** process for collecting and analyzing
- **Plan** for feeding results back into program
- **Complete** session monitoring forms (Facilitator)
- **Observe** and support Facilitators (Supervisors)

TOOLS

Tool 1
Tool 2
Tool 3

FACILITATORS

- Complete program monitoring forms to be delivered to Program Staff

MENTORS/SUPERVISORS

- Collect monitoring forms from Facilitators
- Assess Facilitator competency through observations
- Participate in reflection meetings with Program Staff
- Complete report of monitoring tasks with Facilitators

STAKEHOLDERS

- Participate in regular reflection meetings with their peers and other Program Staff

PROGRAM STAFF

- Conduct reflection meetings with Stakeholders
- Process, analyze and report on monitoring data
- Conduct periodic field visits

9 Monitoring

Program monitoring is important for ensuring that your program is delivering quality services. Think of monitoring as a tool for helping to improve your program. Solid monitoring provides a means of overseeing implementation, identifying what is going well and what needs improvement in the program, and a basis for making decisions about changes that are needed to correct or enhance the program activities. This section focuses on monitoring Group Learning and Counseling activities, including what to monitor, what to consider when designing your monitoring component, and recommendations based on the WALAN experience (Figure 9).

Monitoring Group Learning and Counseling

It is recommended that you utilize at least two strategies for monitoring Group Learning and Counseling. One is having Facilitators complete tracking/recording forms at each session that they conduct to collect data on program outputs, participant demographic data, and other indicators set by your program. The second is Supportive Supervision by the Supervisors to promote quality assurance. These two strategies can complement one another and feed into your program's overall learning and improvement.

Monitoring forms

Facilitators should complete a recording form at each session that they conduct. This serves to document the activities that were conducted and collect data on any indicators that your program may be interested in. Other items that promote program quality could also be included in the form. For example, there could be a section for Facilitators to record any questions or challenges that came up during the session that they would like to discuss with their supervisor. Sample monitoring forms for Community Learning and Group Counseling sessions are included in the Library at the end of the handbook. These or relevant elements can be adapted for your program.

Monitoring and supportive supervision

Ongoing mentoring and supervision is essential to ensuring that facilitators are able to perform their role well. In programs where facilitators do not have a strong health background, it is particularly important that supervisors regularly check in with facilitators, ensure that they present correct information during sessions, and coach facilitators to strengthen their skills in facilitating dialogue around the topics discussed in the group sessions as well as the counseling with couples. It is recommended that supervisors observe Facilitators conducting both Community Learning and Group Counseling sessions, and provide feedback on what Facilitators did will and what can be improved. A checklist can guide the observation, and serve as a reminder to Mentors/Supervisors for what they should look for in each session. Mentors/

Supervisors should note any information that the Facilitator may be presenting incorrectly, review this with the facilitator, and consider reviewing this with all Facilitators during reflection meetings of future refresher training. Following each observation, Supervisors and Facilitator should discuss what is working well, challenges the facilitator is facing and how to address these, and any questions the facilitator has.

Utilizing the Monitoring and Observation Data for Programmatic Improvement

Data that is collected should be regularly utilized to track progress, identify issues in implementation, and inform decisions on adjustments that may be needed in the program. Recording/tracking forms should be collected on a regular basis, and the data entered into a database. The results should be analyzed, summarized, and shared with those involved in implementation of the Group Learning and Counseling activities. These results should be used as a tool for reflecting on program performance. We recommend holding reflection meetings where the data is reviewed and the team discusses implications for program improvement. Some key questions to consider during these meetings include:

- What is working well with the program? What should we continue doing to maintain this success?
- What is not working well with the program? What might be the source of this issue? How can we address this?
- What can program managers and Supervisors do to better support the Facilitators?

The mentoring conducted by Mentors/Supervisors provide important complementary information to the facilitators recording forms. These visits give Supervisors a better understanding of how Facilitators are performing, what challenges they are facing, and the types of strategies that work well for addressing issues.

What to Consider when Deciding on the Monitoring Component

Monitoring is most useful when structured in such a way that the information is relatively easy to collect, shared regularly with among those involved in implementation, and actively utilized to inform program decision-making. Work with the implementers, managers, and stakeholders to identify what data is most important for your program to collect data on, what is feasible for facilitators to collect, the process for collecting and analyzing data, and how that information will be fed back into the program. The first step is **deciding what to collect information on.** This will likely include:

- **Outputs**, such as the number of sessions conducted and the number of supplies (CycleBeads, TwoDay Method Client Cards) distributed
- **Attendance and method user registry data,** such as the number of attendees, age, sex, and location of residence of participants
- **Quality,** such as how well the session was delivered, whether all key information was delivered correctly, and how well the facilitator interacts with participants
- Acceptability by the community members benefiting from the activities.
- Other data required by your organization or funder.

Additional information that may be useful to your program or organization could include whether participants are new family planning users, whether they are attending sessions with their partner, and feedback from participants. Keep in mind that while there may be many items that the program team and other stakeholders want data on, the more that is included in the system, the more difficult it will be to implement. Identify what is most critical for your program to collect data on, and only collect information that the program will utilize.

Next, identify the process for collecting and analyzing the data that is collected. Consider each step in this process, including:

- How and when facilitators will complete the form
- Where facilitators will store completed forms
- How and when completed forms will be collected
- How information on the forms will be entered into an electronic system and analyzed

Walk through each step in this process with those that will be implementing and managing implementation to ensure that the processes will be feasible and clear to those involved. Identify potential roadblocks and adjust the process, or come up with a plan for managing these. Ensure that Facilitators and Mentors/Supervisors are trained in the forms and process. The table below shows an example of how the Monitoring Data Processes could be structured.

Finally, develop a plan for feeding monitoring results back into the program. M&E data is most useful when it is regularly analyzed and summarized, shared with those involved in implementing and managing the program, and actively utilized to identify problems, inform solutions to those problems, and celebrate programmatic successes. Recommendations for doing this include:

- Summarize the data and share it with facilitators, supervisors, and/or program managers. This could be shared electronically, via printed materials, or through a presentation in a meeting.
- Hold a meeting on a regular basis (monthly or quarterly) to review the data, reflect on why things are happening as they are, share recommendations for good implementation, and identify solutions to challenges. For example, if some facilitators are not holding as many sessions as they scheduled, supervisors help them identify the cause and possible solutions. It may be that they are not comfortable with their role and feel they need more support to reach a comfort level for holding sessions. It may be that leaders in their community are discouraging them from holding sessions. At each meeting, identify concrete action items for steps that should be taken based on challenges and success that were identified.
- Get input from facilitators. Build in time during mentoring/supervisory visits or during reflection meetings with facilitators to get input directly from them on why certain situations are happening. Such discussions can also lead to useful programmatic insights.

Establishing or adapting the monitoring component for the Group Learning and Counseling activities is an iterative process. As you walk through each of these steps, you may realize that items in other steps need to be adjusted, or that it will not be feasible to collect certain information. In planning for how the information will be utilized in the program, you may realize there is additional information that will be important for decision makers to have.

Actor	Process	Timeframe
Facilitators	• Complete Attendance and Mthod User Registry Forms at each Community Learning Session and Group Counseling Session • Store forms in sealed, dark colored envelope for confidentiality • Give all completed forms to Supervisor during monthly visits	Ongoing, whenever a session is conducted
Supervisors	• Once a month, Mentors/Supervisors visit Facilitators to observe a session and provide mentoring and supervision • Supervisors complete observation checklist during this visit • Supervisors collect all the forms completed during previous month • Forms are stored in sealed, dark colored envelope for confidentiality	Once per month
Program Manager	• Meets with Supervisors on a monthly basis for Reflection Meeting • Collects Attendance Forms and Observation Checklist from Supervisors at this meeting • Gives Attendance Forms and Observation Checklist to data entry staff • Data entry staff enters all data into database and conducts quality assuance • Data entry staff and Program Coordinator run tabulations and produce summary reports • Summary reports and data are utlized for project reporting	Once per month

Recommendations

Simplify and streamline as much as possible

Where possible, build the monitoring for Group Learning and Counseling into your organization's existing processes. Following the same procedures and linking the systems will make it easier for staff to implement the system. When setting up processes specific to Group Learning, find ways to link monitoring to other program activities. In WALAN, Supervisors collected monitoring forms from Facilitators during regularly scheduled mentoring visits, and turned them in to program management staff during regularly scheduled reflection meetings.

Think through each step of the process in detail
Think through each step of the process, from the person filling out the form during the session, to what they do with the form after the session, to how the form gets collected and brought back to a central location, to how the data gets entered, to how it gets utilized. This process will help identify potential obstacles and allow your team to prevent or plan for these. Discuss the steps with the people involved or people who understand the context well, so that they can provide input on how to improve the system.

Identify a procedure for Data Quality Assurance
There are many points in Monitoring which have the potential for error. Building data quality checks into your regular monitoring processes will help to identify and correct errors. Issues you may encounter include that Facilitators may not complete all information on a form; may complete something incorrectly; fail to turn in the forms.

Errors can also happen during data entry, such as incorrect or duplicate entries.
It is important to review the database to check for these issues, and most data quality issues will become apparent during the data analysis process. Once potential issues are identified, they can be corrected by referring back to the original forms, comparing the data to other program records, and/or talking to the Facilitators themselves. If similar issues are found across sites, such as Facilitators completing a portion of a monitoring form incorrectly, review this during mentoring/supervisory visits with Facilitators.

Be mindful of the sensitive nature of personal data
The topics discussed in Group Learning are considered sensitive and personal in most cultures. Though WALAN is designed to be conducted in public settings, collecting personally identifiable information about attendees is sensitive and should be done with caution. Principles of privacy, confidentiality, and ethics should be paramount in deciding what information to collect, where information will be stored, and how information will be utilized. Personally identifiable information should only be collected if it is essential to the program. Facilitators should have a way of storing monitoring forms securely until the forms are collected by supervisors. You should follow your organization's ethical guidelines for recording personal data.

Keep in mind that in places where family planning is considered taboo, women may attend Group Learning and Counseling without their husband's knowledge, and may face violence at home if he finds out she attended a session on family planning.

In such settings, recording names of attendees may not be advisable, or there would need to be a system for ensuring that such records remain secure at a health center.

THE WALAN STORY

Setting up monitoring

Monitoring of the WALAN pilot went through a collaborative process in which the program and monitoring staff discussed what information should be collected for monitoring, evaluation and reporting purposes. Forms with the suggested data points were drafted and then translated into the local language. The forms were later revised based on feedback from facilitators and their experience using them. The team created a flow chart which detailed each step in the monitoring process. The team identified potential challenges and bottlenecks in the system, made revisions, and discussed how to respond to issues that might arise. Facilitators and CDOs were trained on the Monitoring forms and process as part of the WALAN training workshop. They practiced completing the forms both using a hypothetical scenario during the classroom portion, and as part of a practical activity that was incorporated into the training.

Recording Community Learning Sessions

Facilitators opted to complete the Attendance Form during the middle of Community Learning sessions. This became an entertaining activity in the middle of the sessions that participants enjoyed. Getting accurate counts of people in an informal outdoor setting can be cumbersome, so the reported numbers were considered to be reasonable estimates of the number of people who attended each session.

Recording Group Counseling Sessions

Facilitators completed the Method User Registry at the beginning of each Group Counseling session. This form includes participant names, method eligibility criteria, and whether participants adopted and took home a method. Names were collected in order for facilitators to follow up with users and notify them of support sessions. Data on method eligibility and taking home a method served as a supervision and support data point for supervisors and managers, who reviewed this to make sure that only those who were eligible to use a method took one home. Where discrepancies were found, CDOs reviewed the criteria with facilitators to strengthen their skills.

Recording method supplies

Facilitators should also complete the Monthly Supply Form (see Resource Library). This form includes a running tally of the number of materials distributed to group members, including condoms, CycleBeads, TwoDay Client Cards and FP invitation cards.

How we used the data

CDOs collected forms from facilitators during monthly supervisory visits. During these visits, the CDOs observed the facilitators delivering a session using a checklist, and gave feedback to improve the facilitators' performance. This was also an opportunity for facilitators to ask questions and bring up challenges or issues with the CDO. CDOs reviewed the monitoring forms with facilitators before collecting them, to identify and correct errors in completion or missing information.

A reflection meeting with CDOs was held about once a month. This provided a space for CDOs to share successes and challenges, discuss issues they were facing, and collectively generate solutions. CDOs brought all of the forms that they had collected from facilitators to these meetings and gave them to the program coordinator.

The information on the forms was then entered into an Excel database. The data was analyzed and summarized every two to three months in advance of a reflection meeting. This provided an opportunity for the project team to see how things were going, identify areas that needed improvement, and discuss solutions. The data was useful in identifying issues in implementation, and the discussions promoted collective problem solving.