RutgersWPF

EXPLORE

Toolkit for involving young people as researchers in sexual and reproductive health programmes

Monitoring and evaluation and research in SRHR programmes for young people: **Training manual**

EXPLORE

Toolkit for involving young people as researchers in sexual and reproductive health programmes

This toolkit is based on the original Explore toolkit but enhanced with experiences and materials of the 'Do They Match' Participatory Research Project; Rutgers WPF's experience with training and involving young people in monitoring and evaluation (M&E) and research; and IPPF's experiences with rapid PEER reviews carried out by young people.

The training methodologies described in this toolkit have been applied and tested in different settings in Africa and Asia, with different groups of young people (children, adolescents, young people, with different social and educational backgrounds) and in relation to different research and M&E activities and projects. The training methodologies are developed in interaction with young people and on the basis of their feedback and evaluations. We consider this toolkit a work in progress, as the methodology continues to develop through experience.

The development of this toolkit would not have been possible without the financial support from the Dutch Ministry of Foreign Affairs, the staff of the youth team at IPPF central office, the staff of the international research department of Rutgers WPF, staff from IPPF's member associations and Rutgers WPF's partner organizations, and the young researchers involved in the research projects, M&E and PEER review activities.

Authors: Miranda van Reeuwijk and Ruth van Zorge

Published March 2013

Photos by: front cover, IPPF/Chloe Hall/Portugal; pages 2 and 3, Rutgers WPF.

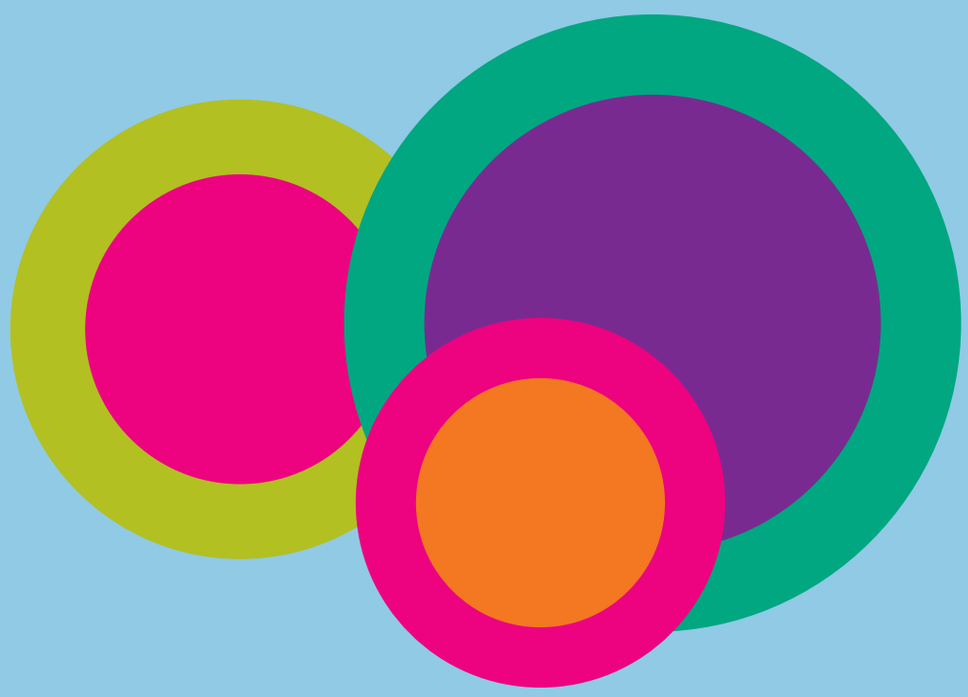
The photographs used in this publication are for illustrative purposes only; they do not imply any particular attitudes, behaviour or actions on the part of any person who appears in the photographs.

Designed by www.janeshepherd.com

Introduction to this manual

This manual is part of the Explore toolkit for involving young people in monitoring and evaluation (M&E) and research. We refer to the toolkit for instructions on how to compose your own specific training and for instructions on how to conduct an effective, youth-friendly training and how to support the young researchers during the M&E and research process.

This training manual is ideally used together with the handbook. The handbook contains basic background information on monitoring and evaluation and research, which can assist participants in their work and which can be used as reference material.



This training manual was developed within the context of the Youth Incentives international programme on Young People and Sexuality of the Rutgers NISSO Group, presently Rutgers WPF. The M&E and research training was developed to train both professional staff of partner organizations and youth volunteers wanting to be involved in monitoring and research. The training aims to provide understanding, skills and tools to implement monitoring, evaluation and research within a youth sexual and reproductive health and rights (SRHR) programme that follows a log-frame approach. Therefore, this training specifically focuses on using this approach, although we realize there are many alternative designs for monitoring and evaluation that are not described in this manual.

The implementation of M&E plans is central to this training. Certain research elements are crucial for the implementation of an M&E plan, including collecting data, analysing this data and drawing conclusions from these findings for the improvement of the project. To strengthen the implementation of the M&E plans, this training incorporates these fundamental elements of research.

Finally, Rutgers WPF appreciates any feedback or comments from those who have been trained and who have worked with the materials, as these are considered to be 'living' documents. Feedback can assist the further development and adaptation of the training and training materials, including this manual.

Goal

The overall goal of the training is for the participants to learn how to demonstrate changes that have been achieved by the project.

Objectives

In order to reach the goal of the training, the following objectives have been formulated. By the end of the training, participants will have:

1. finalized (and made concrete) the M&E plan
2. enhanced skills in monitoring and evaluation, specifically in the formulation of qualitative indicators
3. enhanced skills to implement the M&E plan, with a specific emphasis on data collection for qualitative indicators
4. decided upon reporting tools for quantitative and qualitative data
5. enhanced skills in applying M&E data for project improvement

Time frame

4–5 days: This manual consists of various sessions, ordered into building blocks. It offers a logical order of sessions, however, the trainer is free to arrange them according to his or her own ideas, group dynamics or the context. The duration of the building blocks and the sessions is an estimation, based on the training experiences of the developers of this manual.

General preparations

Before the onset of the training, it is important to make the following preparations:

- Study the relevant project or programme's planning, monitoring and evaluation (PME) protocols so you know what needs attention/further development, etc.
- Select two qualitative indicators that you will use to practice with during the training and to collect qualitative data on during the focus group discussion (FGD) practice in the field.
- Prepare with the organizing institution the logistics for conducting FGDs in the field with the trainees (for more instructions check the relevant sessions).

ABBREVIATIONS

FGD	focus group discussion
M&E	monitoring and evaluation
PME	planning, monitoring and evaluation
RAP	rights, acceptance and participation
SMART	specific, measurable, achievable, relevant, time-bound
SRHR	sexual and reproductive health and rights
YIF	Youth Incentives Fund

Building block I

Defining the qualitative indicators of the M&E plan

OBJECTIVES

- To have a clear understanding of the objectives and set up of the training
- To be familiar with the project objectives and if relevant, the outcomes of earlier evaluations
- To have a clear understanding of the value of M&E for the project
- To understand the value of research within M&E
- To know the difference between output and outcome indicators, and are able to translate these concepts towards their own programme
- To be familiar with the concepts efficiency, effectiveness, relevance and sustainability
- To have identified priorities for monitoring and formulated three qualitative indicators

BUILDING BLOCK I: SESSIONS AND TIMES

SESSION	TITLE	TIME
	Welcome	**150 minutes**
	■ Energizer: fire! fire!	20 minutes
	■ Alliterate! The name game	10 minutes
	■ Interview your neighbour	20 minutes
	■ Official welcome	20 minutes
	■ Setting ground rules	20 minutes
	■ Training objectives and agenda	60 minutes
1	**Setting the scene in M&E**	**80 minutes**
2	**Working with indicators**	**90 minutes**
3	**Specifying qualitative indicators**	**60 minutes**
4	**Means of verification**	**60 minutes**

Welcome

OBJECTIVES

- Getting to know each other
- Setting ground rules

SESSION TIME

60 minutes

TOOLS AND MATERIALS

- Ball
- Name tags

STEPS

1. Energizers
2. Official opening and introduction
3. Explanation of ground rules

Energizer: fire! fire!

TIME 20 minutes

INSTRUCTIONS

1. Stand in a circle and explain: imagine that we are all standing on a hot savannah landscape, the earth beneath us is scorching hot. So hot that the savannah is catching fire! When I yell "Fire! Fire!" everyone will run around the room trying to avoid burning your feet. Then I yell "Stop" and a number, for example "Three". Then you stop and form a group of three people as quickly as possible. Once in the group I will give you instructions what to do with your group.
2. Start the energizer by yelling "Fire! Fire!" When they have run around for a minute, yell "Stop" and a number (two, three or four). When they have formed groups ask them to introduce themselves, give their age and where they are from.
3. After a few minutes, when you think most of them have discussed their answers, yell "Fire! Fire!" again. Make them stop and form groups. You can do this several times. You can, for instance, ask the trainees to discuss:
   - *A good and a bad habit you have*
   - *Things you really like and dislike*
   - *The first time you fell in love*
   - *Why you want to be part of the training?*
   - *What you think this research will be about?*
4. It is good to join in this energizer yourself!

Alliterate! The name game

TIME 10 minutes

INSTRUCTIONS

1. Stand in a circle and throw the ball to each other. When the person catches the ball, this person gives his or her name in the form of a rhyme (alliteration), for example 'Hungry Henri'. Then Hungry Henri throws the ball to someone else. This person first mentions the name of the person who threw the ball and adds his or her own alliteration, this continues until the circle is complete. This exercise is good for remembering each other's names, and creates some laughs!
2. Finalize by writing the alliterations on the blackboard or flipchart and leave it there for the whole of the first day.

Interview your neighbour

TIME 20 minutes

INSTRUCTIONS

1. Make teams of two people. Tell the teams they have to get to know each other through a small interview. Each team is given roughly five minutes to exchange personal information. This could include information about hobbies, education, family, background, age, whether or not they have a partner, etc. It is recommended that they take notes and write down what the other person is saying.
2. Ask them to introduce each other to the group, based on the interview. The exercise is good in letting the group get acquainted with each other, it also allows the participants to practise presenting information.

Official welcome

TIME 20 minutes

INSTRUCTIONS

1. Have a formal introduction round and word of welcome carried out by a representative of the organization for which the research or monitoring and evaluation (M&E) is being done.
2. Finish by allowing the trainees to ask the representative questions. If they are shy, you can initiate by asking some questions yourself, for example:
   - *What do you expect of these young people?*
   - *How is this research going to help your organization?*
   - *What do you think will be one of the things that will be interesting about this research?*

Setting ground rules

TIME 20 minutes

INSTRUCTIONS

1. Explain to the group that you are going to work together closely and therefore you need to trust one another and make each other feel free to contribute.
2. Ask the group what they need to make them feel comfortable in speaking their minds, or the opposite, what makes them shy.
3. Based on this discussion, make an agreement about how you are going to work during the training, and write the points down on a flipchart so that you can keep these 'rules' for the duration of the training. For example, you can think about the following rules:
   - > Do not interrupt each other
   - > Do not make fun of each other
   - > Be sensitive about personal information and feelings
   - > Be on time
   - > No mobile phones in the class
4. You can also make agreements about timekeeping or about what should be done if someone breaks the rules.

Training objectives and agenda

TIME 60 minutes

INSTRUCTIONS

1. Presentation of the project overview

- Prepare a sheet with the main goal and the specific objectives of the local project. Leave some space open under each objective.
- Ask the participants to mention what activities they do to reach the particular objective, fill these in on the flip chart.

2. Round: Name and role/activities in the project

- Conduct an introduction round, by asking the following questions:
  - *What is your name?* .....
  - *Can you tell me how you are involved in the project?* .....
  - *Do you think that your work helps the young people?* .....
  - *How do you know? (observations, talking with people)* .....
- Explain that this is what we need to 'show', so that others also understand why people do what they do and why they need money and time for this.

3. Goal of the training and the agenda

- Explain the goal of the training to the participants: **to learn how to demonstrate changes that have been achieved by the project.**
- During this training the participants will learn:
  - > what the reasons are for M&E and research
  - > how to purposefully collect information on the effect of their activities
  - > how to make sure this information is put to good use: reporting and learning

OBJECTIVES

- To inform participants on the goal of the training, the objectives, the agenda and the trainers' expectations

TOOLS AND MATERIALS

- Flip chart
- Prepared sheet with objectives of the project

STEPS

1. Presentation of the project overview
2. Round: Name and role/ activities in the project
3. Goal of the training and the agenda

Session 1: Setting the scene in M&E

OBJECTIVES

- To have a common understanding why M&E is important for the project
- To know what kind of information is important in M&E in general
- To understand why research is an important aspect of M&E

SESSION TIME

80 minutes

TOOLS AND MATERIALS

Prepared sheets for handout:

- Why we need M&E (Handbook 1.1) and important elements of M&E (Handbook 1.3).
- Difference between monitoring and evaluation (Handbook 1.2)

STEPS

1. Exercise: Importance of M&E (15 minutes)
2. Exercise: Project Weight Loss (20 minutes)
3. Difference between monitoring and evaluation (15 minutes)
4. Role of research in M&E (15 minutes)
5. Relevance for the project (15 minutes)

INSTRUCTIONS

1. Exercise: Importance of M&E

- Ask the group to sit in a half circle. Then pose the question:
  - *Why is M&E important in the project?*
- The first person in the row gives one answer, the second person a second one, which needs to be different from the first. After the last person in the row has answered the question, the order will be reversed. Write down all answers on the flip chart and continue this exercise until no new ideas are being offered.

2. Exercise: 'Project Weight Loss'

- Illustrate the importance of M&E by using the example of Project Weight Loss. Present the example as if you were the person wanting to lose weight. Your goal was to lose 10 kg in six months. Encourage the participants to ask you questions, to find out:
  - *have you have reached your objective? (e.g. only 2 kg in six months)*
  - *what were the factors that enabled your weight loss? (e.g. sports, diet)*
  - *what were the factors that limited your weight loss (e.g. parties, pregnancy)*
- Through asking questions and 'monitoring' the weight loss process, the participants may find out that sports are more effective for obtaining the goal than diet, that jogging is more efficient than playing squash (cheaper, easier to organize) and that playing sports will have a more sustainable effect than trying to keep to a diet. In the case of a female facilitator, the clue might even be that her set objective turned out to be no longer relevant, because she discovered she was pregnant.
- Show the prepared sheet (Box 1) with the main reasons for M&E and summarize and explain these.

BOX 1: Main reasons for M&E

1. To check your project – are we doing the things that we set out to do?
   - Planning
   - Budget
   - Content
2. To manage your project – planning and adaptation
3. To check your assumptions – are we achieving what we set out to achieve?
4. For learning and improving – not only what goes well but what also goes wrong and where improvements can be made
5. For motivation and support
6. For accountability – upward and downward

3. Difference between monitoring and evaluation

- Summarize and explain the difference between monitoring and evaluation (see Box 2).

BOX 2: Difference between monitoring and evaluation

Monitoring …

- is an ongoing process
- looks at operations
- can be done by anyone
- usually looks at activities (outputs) – this is a different level of analysis than evaluation.

Evaluation …

- is periodic
- focuses on results and benefits (effectiveness)
- looks at cost/benefits (efficiency)
- sometimes needs experts to be conducted
- focuses on results (outcomes)
- is in-depth.

4. Role of research in M&E

- Explain the role of research in M&E by answering the following questions:
  - *What do we mean with research?* .....
  - *Why is research important for M&E?* .....
- Use examples from the Project weight loss exercise to clarify the role of research.

5. Relevance for the project

- Key questions we always have to ask ourselves when collecting data are:
  - *What does this mean for my project?* .....
  - *How will I act upon it?* .....
- Use these questions to introduce the four important elements in M&E: **relevance, effectiveness, efficiency, sustainability**.

Session 2: Working with indicators

OBJECTIVES

- To learn the meaning of indicators
- To learn the difference between output and outcome indicators
- To learn the elements of a (SMART) indicator

SESSION TIME

90 minutes

TOOLS AND MATERIALS

- Prepared sheet(s) with explanation on indicators (Handbook 1.5)
- Cards for exercise in step 4
- Prepared sheet with explanation on SMART (Handbook 1.5.4)
- Prepared examples of SMART indicators, quantitative and qualitative, including one indicator of the M&E plan

STEPS

1. What are indicators?
2. Difference between output and outcome indicators
3. Difference between quantitative and qualitative indicators
4. Exercise: Output/outcome indicators in the M&E plan
5. Short explanation on SMART

If an M&E plan has already been developed do step 6.

6. Exercise: Check whether M&E plan indicators are SMART

If an M&E plan still needs to be developed do step 7.

7. Introduce two other SMART indicators
8. Introduce the two qualitative outcome indicators for the rest of the week

TIME First 3 steps: 45 minutes. Last steps: 45 minutes

INSTRUCTIONS

1. What are indicators?

- Explain that indicators should be based on the objectives: What kind of change does a project want to see in the target groups? What do we want to measure/when are we satisfied?
- This is where indicators should be developed. Indicators are used to measure or demonstrate the change that a project has achieved through its activities. Refer to the Project Weight Loss exercise to illustrate this.

KEY TERM

An indicator …

- is the measure that is used to assess if an objective has been achieved or what progress has been made
- helps project staff to understand where they are, which way they are going and how far they are from where they want to be
- answers the question: When are we satisfied with the results? (after indicator targets have been set)

- Stress the importance of setting indicator targets beforehand, so that project staff can tell whether progress is being made.
- In many M&E plans, indicators are forgotten or are not specific enough. Sometimes they are only filled in after a year or even two years. Ask the participants the following question:

  ❓ *Why do you think it is problematic to develop indicators at a later stage, compared to in the beginning?*

2. Difference between output and outcome indicators

- Explain the difference between output and outcome indicators (see Box 3).

BOX 3: Difference between output and outcome indicators

Output indicators are:

- related directly to the activities, i.e. are a direct result of the activity
- directly observable
- quantitative (number)

Outcome indicators are:

- benefits and changes resulting from activities
- measured after activities have taken place
- qualitative or quantitative

Outputs and outcomes are logically linked, for example:
Output: 'number of participants at the training in city X'
Outcome: 'increased ability to demonstrate results amongst the project staff and participants'

3. Difference between quantitative and qualitative indicators

- Now, explain the difference between qualitative and quantitative indicators.

KEY TERMS

Quantitative indicators

- Quantity = amount
- Tell you something about how much/how many
- Example: 'increased number of young people going to youth-friendly clinics'

Qualitative indicators

- Tell you how people feel about something, how people behave or how things are done
- Example: 'stories of change on increased ability to negotiate condom use since participation in peer education sessions'

4. Exercise: Output/outcome indicators in the M&E plan

- Before this session, prepare cards for this exercise. Write down one indicator on each card (one card per participant). You could use examples from their own M&E plan, if they have one, or your own examples.
- Give all participants one prepared card and instruct them to take turns in walking to the 'sticky wall'. Each participant should decide whether the indicator on his/her card is an output or an outcome indicator and place the card on the sticky wall in the right place.
- After all participants have made a choice, stimulate the group to respond, give feedback yourself and provide an explanation.

5. Short explanation on SMART

- Explain what SMART stands for (see Key term box).

If the M&E plan already has already been developed

6. Exercise: Check whether M&E plan indicators are SMART

- Check with the group whether the indicators specified in the plan are SMART.

If the M&E plan still needs to be developed

7. Introduce two other SMART indicators

- Give the example of two other indicators, one from a fictitious project (e.g. Project Weight Loss) and the other from a real project (e.g. level of knowledge) Demonstrate whether they are SMART or not.

8. Introduce two qualitative outcome indicators

- Now, introduce the two qualitative outcome indicators from the M&E plan that the group is going to work with in the rest of the week.

KEY TERM

SMART stands for:

Specific
Measurable
Achievable
Relevant
Time-bound

Specific: The indicator needs to be specific on the who/what/when and where. For example; 'increased knowledge on sexual and reproductive health and rights' is too broad; specify this to 'increased knowledge on prevention of sexually transmitted infections (STIs) for boys and girls in city X because of school education programme'.

Measurable: The indicator needs to have the capacity to be counted, observed, tested or analyzed. For example, 'increased knowledge on STIs from 20% to 50% of target group'.

Achievable/Attainable: You should set realistic indicators, plans that are too ambitious will only cause frustration.

Relevant: The indicators should have a clear link to your objectives.

Time-bound: You should specify within which time frame you aim to achieve your results.

Session 3: Specifying qualitative indicators

OBJECTIVES

- To learn how to develop a (SMART) qualitative indicator
- To specify the qualitative indicators in the M&E plan

SESSION TIME

60 minutes

TOOLS AND MATERIALS

- Prepared sheet with table (as in left-hand column), filled in with objectives and activities, as produced during the earlier sessions. If you have a 'sticky wall', you could also use this to represent the table.

PREPARATION

The facilitators choose two qualitative outcome indicators that we will work with during the week. The facilitators have brainstormed on qualitative outcome indicators for the project beforehand, in order to give instructions for the sampling of informants for the FGD practice. The two qualitative indicators that are chosen can and will be used for the FGD practice.

STEPS

1. From project objectives and activities to indicators
2. The facilitators will choose two qualitative outcome indicators that we will work with during the week

INSTRUCTIONS

1. From project objectives and activities to indicators

- Ask the participants what exactly they want to achieve with the activity and when they will be satisfied. The group should brainstorm about this and come up with different indicators (output and outcome). They can fill out the box in the sheet or on the 'sticky wall'.

A: OBJECTIVE	B: OUTCOME INDICATOR	C: OUTPUT INDICATOR	D: ACTIVITY
1. Lose weight	Facilitator loses 10 kg within one year	150 gymnastic sessions a year	Going to sport club
2. Increase access to youth-friendly services	50% of the young clients report satisfaction with services	20 service providers trained in youth-friendly services	Conducting orientation workshop on youth-friendly services for service providers
3. Young people are able to make safe and informed decisions	Improved peer education (increased use of RAP approach by peer educators).	On the project site 60 peer educators will be trained on the RAP approach	Conducting a refresher course for peer educators on the RAP approach
4. Increase access to youth-friendly services	a) Increased knowledge on SRHR b) Increased number of young people that refer to the services	5,000 young people are reached through peer education sessions	Conducting peer educator sessions

2. Choose two qualitative outcome indicators to work with during the week

BOX 4: Examples of qualitative outcome indicators

- Improved attitudes towards youth-friendly services
- Increased level of participation
- Stories of change
- Increased empowerment
- Increased capacity of partner organizations to implement SRHR projects

Session 4: Means of verification

OBJECTIVES

- To learn about different methods of data collection and their advantages and disadvantages
- To decide how to obtain the data to inform the two qualitative outcome indicators

SESSION TIME

60 minutes

TOOLS AND MATERIALS

- A prepared flipchart sheet for filling in with means of verification for two qualitative outcome indicators.
- Handout of data collection methods (Handbook 2.2)

STEPS

1. Plenary brainstorm on methods for collecting data
2. How to select the best method
3. Plenary decision on means of verification for the two indicators
4. Exercise: Data collection plan *(optional)*

TIME Steps 1 and 2: 35 minutes. Step 3: 25 minutes

INSTRUCTIONS

1. Plenary brainstorm on methods for collecting data

- Let the group brainstorm ('out of the box') on methods for collecting data (to inform the two indicators).

2. How to select the best method

- Explain how to select the best data collection method, in terms of:
  - > Type of data (in-depth/general)
  - > Generalizability
  - > Validity (true experience or norm?)
  - > Necessary researcher skills (amount of rapport, level of analysis)
  - > Time and resources
- Include an explanation of the pros and cons of the different methodologies as described in the Handbook.

3. Decision on means of verification for the two indicators

- Facilitate a plenary decision on the means of verification for the two indicators; fill in the prepared chart on the flipchart.

QUALITATIVE OUTCOME INDICATOR	MEANS OF VERIFICATION
1.	
2.	

Note: Detailed data collection plans for the (qualitative) indicators will be worked out together with the M&E officer(s) and the trainers, in the evening hours.

Building block II

Developing skills for qualitative data collection for M&E

OBJECTIVES

- To have basic knowledge of interview techniques
- To have knowledge about and practical experiences in preparing and conducting an interview or focus group discussion

BUILDING BLOCK II: SESSIONS AND TIMES

SESSION	TITLE	TIME
5	Interview techniques	90 minutes
6	Practising interview skills (role-play)	120 minutes
7	Entry points and probing	30 minutes
8	Preparation of FGDs	60 minutes
9	Practising FGDs in the field	2–4 hours

Session 5: Interview techniques

OBJECTIVES

- To have basic knowledge of what is necessary to conduct a good interview/FGD
- To learn when and how to use open-ended and closed-ended questions
- To learn how to prepare an interview or FGD
- To learn what to do after the interview or FGD has been conducted

SESSION TIME

90 minutes

TOOLS AND MATERIALS

- Sticky paper
- Flipchart
- Prepared sheet with closed-ended questions

STEPS

1. Introduction of exercise: Interviewing the facilitator
2. Exercise: Interviewing the facilitator
3. Open- and closed-ended questions
4. Before and after the interview

TIME Steps 1 and 2: 60 minutes. Steps 3 and 4: 30 minutes

INSTRUCTIONS

1. Introduction of exercise: Interviewing the facilitator

- Introduce the exercise. Explain to the participants that they will be taking turns in interviewing the facilitator (or another volunteer) with the goal to find out: if he/she can negotiate about condom use with his/her current and previous partners and which factors enabled this or made this more difficult.

2. Exercise: Interviewing the facilitator

- For this exercise, it is good to sit in a circle (not behind the desks). Taking turns, ask the participants to sit next to the interviewee and ask him/her a question or some questions.
- Each interview will be paused, for reflection on the verbal and non-verbal aspects of the interviewer who posed the question. The basic elements of interview techniques, written on the flip chart, should be pointed out.

3. Open- and closed-ended questions

- Explain the difference between open-ended and closed-ended questions. Examples can be found in the table below (see also Handbook 3.3.6).

CLOSED-ENDED QUESTION	OPEN-ENDED QUESTION
Do you think the information brochure is good?	What do you think about the information brochure?
Is the service provider friendly?	Can you tell me about your visit to the clinic/service?
Did you find the meeting useful?	How did you like the meeting? What did you think of the meeting?
Did you learn from the peer educator?	Where did you learn this? What subjects did the peer educator talk about? What have you learned? What information have you used from the peer educator?

4. Before and after the interview

- Explain what preparations participants need to make before the interview (Handbook 3.2).
- Show which steps they should take after the interview (Handbook 3.4).

BOX 5: Preparation steps

1. Formulate a research question
2. Formulate sub-questions
3. Prepare the order of questions
4. Prepare your introduction
5. Prepare yourself
6. Organize logistics

BOX 6: Steps to take after each interview

1. Work out your notes immediately or as soon as possible
2. Summarize the main questions and the main answers
3. Summarize your main impressions (separate them clearly from the respondents' answers)
4. Write down your own ideas and thoughts (*idem*)
5. Note how the interview went and your impression of the 'trustworthiness' of the informant

Session 6: Practising interview skills

OBJECTIVES

- To learn how to prepare for an interview
- To practise conducting an interview
- To reflect and formulate feedback on how the interview was conducted and the verbal and non-verbal communication that was used

SESSION TIME

120 minutes

TOOLS AND MATERIALS

- Prepared sheets with the four main questions and the composition of groups

STEPS

1. Introduction of role play exercise
2. Preparation of the role plays
3. Role plays 1, 2 and 3

INSTRUCTIONS

1. Introduction of role-play exercise

- Explain to the group that some members will practise conducting an interview through three role plays, each with one informant and two interviewers. The topic that they will talk about is whether the YIF activities have improved the lives of young people with regards to their sexual and reproductive health and rights.
- Each interview will take a maximum of 30 minutes; 10 minutes for each interviewer and 10 minutes for feedback from the group.

2. Preparation of the role plays

- Split the group into three groups and instruct the sub groups to divide the tasks. Ask: who will play the role of the informant and who will play the role of the interviewers?
- Give the groups 20 minutes to prepare their questions. Box 7 has some examples

BOX 7: Possible questions

Have the projects activities increased the possibility of young people to negotiate about condom use?

- Why (not)?
- How do you know?
- How does the project help young people with regards to their SRHR?

3. Role-plays

- Facilitate the three role-plays, each consisting of an interview between one informant and two interviewers (following up on each other), followed by feedback of the group.

Session 7: Entry points and probing

OBJECTIVES

- To recognize entry points during qualitative data collection
- To practise formulating probing questions
- To practise probing

SESSION TIME

30 minutes

TOOLS AND MATERIALS

- Examples of questions from the interview and role plays in the morning/afternoon and/or the prepared example from the Handbook (3.3.7 Entry points and probing)

STEPS

1. Exercise: Examples from the interviews and role plays
2. Exercise: Entry points and probing
3. Discussion of entry points and probing questions

INSTRUCTIONS

1. Exercise: Examples from the interviews and role plays

- Plenary exercise: Take examples of missed entry points from the interviews that were practiced between the participants. Ask the participants to brainstorm the reasons why this was a good entry point and what possible probing questions could have been asked in relation to this entry point.

2. Exercise: Entry points and probing

- Ask the group to split up in small groups of 2–3 people. Refer to the exercise in the workbook and ask the small groups to identify entry points in the text and formulate probing questions. Make sure they do not have access to their handbooks during this exercise, as the answers can be found there. (So it's better to print and hand out the text without the answers).

3. Discussion of entry points and probing questions

- After they have finished, facilitate a plenary discussion on the entry points and probing questions the participants have identified. You can refer to the example in the handbook, where the entry points are in bold, and probing questions have been added in italics.
- You can also organize an ad hoc role play, in which you will play the role of either the boys or the girls and the participants will try out their probing questions on you.

Session 8: Preparation of FGDs

OBJECTIVES

- To prepare the FGD
- To formulate the main objective of the FGD
- To formulate questions informing the main objective
- To learn how to organize an FGD
- To formulate evaluation questions to assess the opinions of the informants on the FGD

SESSION TIME

60 minutes

TOOLS AND MATERIALS

- Prepared sheets on FGDs
- Prepared questions for evaluators to evaluate FGDs (see Handbook 2.2.3)

STEPS

1. Discussion on the best ways to conduct an FGD
2. How to prepare an FGD/ interview
3. Different roles and why these are necessary
4. Division of tasks for the fieldwork practice
5. Preparation of the FGDs in groups

INSTRUCTIONS

1. Discussion on the best ways to conduct an FGD

- Facilitate a plenary discussion on the best ways to conduct an FGD (what is an FGD, specifics, etc.).

2. How to prepare an FGD/interview

- Instruct the participants on how to prepare an FGD (from main question, topics, question list for FGD per topic).

3. Different roles and why these are necessary

- Summarize the different tasks and explain the goal of evaluating the FGD.

BOX 8: Different roles

- **Facilitator(s):** person(s) who will ask the questions
- **Data recorder:** person who will make notes on the contents
- **Observers:** persons who will make notes on the 'form' (process):
  - > Non-verbal communication
  - > Did participants openly share?
  - > Were they at ease?
  - > What barriers can be observed?
  - > What topics or questions were more difficult?
  - > What makes them feel at ease?
- **Evaluator(s):** person(s) who will shortly interview FGD participants after ending the FGD on their opinion of the discussion, using the following questions:
  - > What did you think of the FGD?
  - > Did you feel comfortable/free to share your opinion?
  - > Did you understand the reason for this FGD?

4. Division of tasks for the fieldwork practice

- Organize a division of tasks for the fieldwork practice: Split up the participants in two groups according to age: adults and young people. Ask both groups to divide the following tasks among themselves:
  - > Facilitators
  - > Data recorder
  - > Observers
  - > Evaluators

5. Preparation of the FGDs in groups

- Instruct the two groups to prepare the following:
  - > Identification of the major objective of the FGD: what do they want to find out?
  - > Identification of main themes/topics (which will later be used for labelling)
  - > Preparation of questions, based on the themes, to guide the FGD

Session 9: Practising FGDs in the field

OBJECTIVES

- To practise conducting an FGD (one per group)
- To record data on how the FGD was experienced by the informants

SESSION TIME

2–4 hours, depending on the location of FGD and time to travel there. The FGD should be 1 hour to 1½ hours maximum.

TOOLS AND MATERIALS

- Preparations/logistics for FGDs

STEPS

1. Transportation to the location
2. Conducting the FGD
3. Evaluate the FGD with informants
4. Transportation back to the training location

PREPARATION

- In the weeks before the training, do not forget to ask the project coordinator to arrange two groups to be interviewed on the morning of the third day of the training, and to arrange the logistics (transportation) for the FGDs. It is best to split up the trainees into two groups and for each group to conduct their own FGD. If you have young people and adults participating in your training, you can make the division by age.
- During the FGDs, observe and make notes (use a translator if you do not speak the local language). You will rely on these notes to check if/what the participants have missed or done right in their analysis and conclusions.

INSTRUCTIONS

- Per FGD group, one facilitator will sit and make notes, in order to be able to prepare feedback on the afternoon presentations. During the lunch break and the hour that the participants will be given after lunch to prepare their presentations, the facilitators have to analyse their own notes and make these preparations.

Building block III

Reflecting on data and formulating conclusions

OBJECTIVES

1. To have practical experience conducting an FGD
2. To be able to reflect on and learn from qualitative data collection experiences
3. To have practical experience on analysing and interpreting FGD data and reporting (presenting) the main findings

BUILDING BLOCK III: SESSIONS AND TIMES

SESSION	TITLE	TIME
10	Preparation of presentations	60 minutes
11	Presentations of the FGD	90 minutes
12	Drawing a good conclusion	30 minutes

Session 10: Preparation of presentations

OBJECTIVES

- To reflect on experiences of the FGD process and content
- To have practical experience of analysing and interpreting FGD data and reporting (presenting) the main findings

SESSION TIME

60 minutes

TOOLS AND MATERIALS

- Notes from the FGDs
- Flipchart sheets (three per group) and markers

STEPS

1. Preparation of presentations

INSTRUCTIONS

1. Preparation of presentations

- Hand out some flipchart sheets and markers to both groups. Ask the groups to prepare their presentations, focusing on:
  - > Goal of FGD: what did you want to know/find out (main research question)
  - > Contents: main findings and results (ordered by topic)
  - > Conclusion: answer to the research question
  - > Observers: what went very well, what was the main weak point

- The observers (the persons who took notes during the FGDs on the communication process) can use the following question list to help them analyse their observations and prepare their comments:
  - *How much consensus is there on a particular topic or explanation?*
  - *Does the answer/conclusion count for both boys and girls?*
  - *Which topics did the group collect conflicting data on?*
  - *Are the data based on the informants' own observations, experiences, or is it hearsay?*
  - *How do you assess the overall 'honesty' of the informants (with regard to specific topics)*
  - *Did the group check/verify the main findings and conclusions with some informants?*

Session 11: Presentations on FGDs

OBJECTIVES

- To reflect on and learn from conducting an FGD with regard to creating the right environment for informants to speak freely
- To reflect on and learn from conducting an FGD with regard to collecting useful data

SESSION TIME

90 minutes

STEPS

1. First group presentation
2. Second group presentation

TIME 45 minutes per group

INSTRUCTIONS

- Ask the first group to present their findings. When they are finished, give the other group some time to respond. Also give feedback yourself. Repeat this for the second group.

Session 12: Drawing a good conclusion

OBJECTIVES

- To learn to critically reflect on statements, arguments and conclusions
- To learn how to assess the validity and reliability of data
- To learn how to strengthen conclusions by building arguments

Note: This session can also be done after Session 13, or during Session 13 as part of the feedback on the presentations.

SESSION TIME

30 minutes

TOOLS AND MATERIALS

- Flipchart sheets with the FGD presentations
- Prepared flipchart sheets with steps to draw a good conclusion (Handbook 5.3) and steps to check validity and reliability of data (Handbook 5.2)

STEPS

1. Reflection on conclusions
2. How to draw a good conclusion
3. Importance of good-quality data

INSTRUCTIONS

1. Reflection on conclusions

- Take one of the conclusions from the presentations as an example. Ask the participants: "How do you know this?" Make them reflect on the lack of argumentation to support their conclusion.

2. How to draw a good conclusion

- Explain the steps on how to draw a good conclusion (see Box 9).

BOX 9: Steps to a good conclusion

- Gives an answer to the question, and a short explanation of why and how
- Is logical (the relationship between cause and effect is clear)
- Is complete and reflexive:
  - > it includes a focus on the positive as well as on the negative
  - > it includes information on what is not found (e.g. no stories of safer sex)
- Is based on strong arguments which in turn are based on sufficient and truthful data
  - > if not, or if weak, the conclusion should include a reflection on the limitations of the research and the validity and reliability of the data, or the conclusion is preceded by such a reflection
- Includes recommendations, or is followed by a paragraph that formulates recommendations

3. Importance of good-quality data

- Explain the importance of collecting sufficient and truthful data. Describe the steps to check validity and reliability of data (see Box 10).

BOX 10: Steps to check validity and reliability of your data

- How much consensus is there on a particular topic or explanation?
- Which topics did I collect conflicting data on?
- Does the answer/conclusion count for boys and girls?
- Are the data based on the informants own observations, experiences, or is it hearsay?
- What do you think of the overall 'honesty' of the informants (with regard to specific topics)
- Are the main findings and conclusions verified with some informants?
- Would the answers be different if you had been male/female, older/younger, had interviewed the informants in a different setting (e.g. in their homes instead of the clinic)?

Building block IV

Applying M&E data for project improvement

OBJECTIVES

- To have an understanding on the best ways to report results and findings
- To understand the process of reflection and learning and can apply the results of their data collection efforts to improve the project

BUILDING BLOCK IV: SESSIONS AND TIMES		
SESSION	TITLE	TIME
13	Applying lessons learned	90 minutes
14	Reporting	90 minutes
15	Developing an M&E (data collection) plan	120 minutes
	Closing session	60 minutes
	■ Evaluation of the training	
	■ Closing ceremony	

Session 13: Applying lessons learned

OBJECTIVES

- To understand the importance of learning
- To assess one's possibilities for learning
- To conclude the assessment of lessons learned and take a decision on action

SESSION TIME

90 minutes

STEPS

1. Discussion on lessons learned
2. Relating lessons learned to core elements of M&E
3. Conditions that facilitate applying lessons learned

INSTRUCTIONS

1. Discussion on lessons learned

- Ask the participants to join their FGD group and discuss the following questions, based on the FGD findings and the two presentations:
  - *a) What was supposed to happen? (objective/target)*
  - *b) What has actually happened? (output/outcome)*
  - *c) What were the positive factors? (contributing to reaching the objectives)*
  - *d) What were the negative factors? (barriers in reaching the objectives)*
  - *e) What have we learned? (how do c) and d) explain b)?)*
  - *How can we use the lessons learned in our programme? (recommendations and adaptations)*
- The goal is to learn how to use this method, which can be used to evaluate the process of a certain activity (for example a focus group discussion) or to evaluate progress towards results (for example to facilitate a discussion on one of the objectives). It is not possible to combine the two options in one exercise. Therefore for this exercise the group needs to choose to either evaluate the process of the FGD, or the lessons learned concerning the main question of the FGD (for example: Has communication on sexuality between the generations changed?).
- It would be best if one group evaluates the FGD process and one group evaluates the lessons learned concerning the main question of their FGD.
- After the preparatory work, ask each group to present the results of its discussion to the members of the other group.

2. Relating lessons learned to core elements of M&E

- Explain why the lessons learned that have been identified, should always be related to the core elements of M&E (Relevance, Effectiveness, Efficiency, Sustainability).

3. Conditions that facilitate applying lessons learned

- Give an overview of conditions that facilitate applying lessons learned and enhance/ensure the process of learning in the project.

Session 14: Reporting

OBJECTIVES

- To become familiar with the concepts of best practices/ lessons learned/case stories/ recommendations
- To become familiar with the reporting formats and its elements
- To become familiar with the reporting activities present in the context of a programme and have an understanding what one's role could be in reporting

SESSION TIME

90 minutes

STEPS

1. Purpose of reporting
2. Important reporting elements
3. Exercise: Mapping of reporting processes
4. Discussion on the mapping results

INSTRUCTIONS

1. Purpose of reporting

- Brainstorm the purpose/importance of documentation and reporting. Explain (organizational) learning, justification and accountability, and creating visibility and (donor, stakeholder, beneficiary) support (see Handbook Chapter 7).

2. Important reporting elements

- Brainstorm important reporting elements (general and specific for the organization of the trainees); discuss and explain them in plenary. For example:
  - > Description of main activities, progress and results
  - > Reflection on challenges and contributing factors
  - > Lessons learned and best practices
  - > Unexpected results
  - > Sustainability
  - > Important SRHR themes and or strategies (e.g. gender, participation, cooperation, capacity building, advocacy)
  - > Recommendations/changes to the project or workplan

3. Exercise: Mapping of reporting processes within the project context

- In order to demonstrate the reporting processes within the project context, divide the group in several subgroups: those with similar tasks/responsibilities can do the exercise together, others will work on it individually.
- Ask the groups and individuals to write down the following for every report they are writing:
  - > The name of the report (e.g. annual report)
  - > How often you write the report
  - > Main content of the report
  - > To whom you will submit the report
  - > With whom you will share the report
- Let all groups and individuals put their contributions on the (sticky) wall under the following headings:

POSITION	NAME OF REPORT	FREQUENCY	CONTENT	SUBMITTED TO	SHARED WITH

4. Discussion on the mapping results

- In plenary discuss issues such as:
  - > Downward accountability
  - > Where does the collection and reporting of good practices take place?
  - > Who writes examples or cases/personal stories?
  - > Who is drawing the final conclusions?
  - > How is the reporting burden?

- The goal of this exercise is to get insights on who is doing the reporting, how the different stakeholders (particularly young people!) are involved, and where there are reporting bottlenecks.

Session 15: Developing an M&E (data collection) plan

OBJECTIVES

- To understand the purpose of an M&E plan, what it contains and who should be involved in developing one
- To draft an M&E (data collection) plan

SESSION TIME

120 minutes

TOOLS AND MATERIALS

- The project's or programme's M&E plan/objectives/indicators. Flipchart sheet or 'sticky wall' representing a data collection plan table (see Annex B in the Handbook).

STEPS

1. Explanation of M&E plan
2. Interactive exercise in drafting an M&E plan

INSTRUCTIONS

- Explain that M&E plans can be used as a guide towards your monitoring activities, with a detailed description of the different monitoring or evaluation steps that need to be taken to show progress and results towards your goals, and to learn from these.
- Explain the five elements in an M&E plan that are important to describe: the scope, the approach, the operational plan, how you intend to use the results and how you will share your findings (see Handbook 8.2: What could be included in a PME plan).
- Use the project's or programme's M&E plan/objectives/indicators/activities to lay out the beginning of an M&E data collection plan (in case of the choice for the logframe method). Use the information from the mapping exercise on reporting processes to identify who is responsible for what (data collection, analysis, reporting etc.). Interactively fill in the table with the answers from the trainees.

OBJECTIVES	ACTIVITIES	INDICATORS	MEANS OF VERIFICATION	WHERE (SAMPLE)	RESPONSIBLE PERSON(S)	FREQUENCY	BUDGET AND TIME ALLOCATION FOR DATA COLLECTION AND ANALYSIS

Closing session

OBJECTIVES

- To reflect on the lessons learned during this training
- To assess whether the training objectives have been met
- To assess whether the form of the training has been effective, efficient, safe and pleasant
- To provide the trainer with input to improve this training in the future
- To close the training officially
- To receive a certificate

SESSION TIME

60 minutes. 30 minutes for evaluation + 30 minutes for a closing ceremony (to be discussed with the host organization of the training)

TOOLS AND MATERIALS

- Evaluation forms, pens for all participants
- Personalized certificates signed by the trainer (to be discussed with the host organization of the training)

STEPS

1. Instructions on evaluation form including the objectives (to enable trainers to improve the programme and get feedback on their performance)
2. Filling out the evaluation forms and/or oral evaluation and feedback round
3. Closing ceremony

INSTRUCTIONS

1. Explain the purpose and methods of the evaluation.

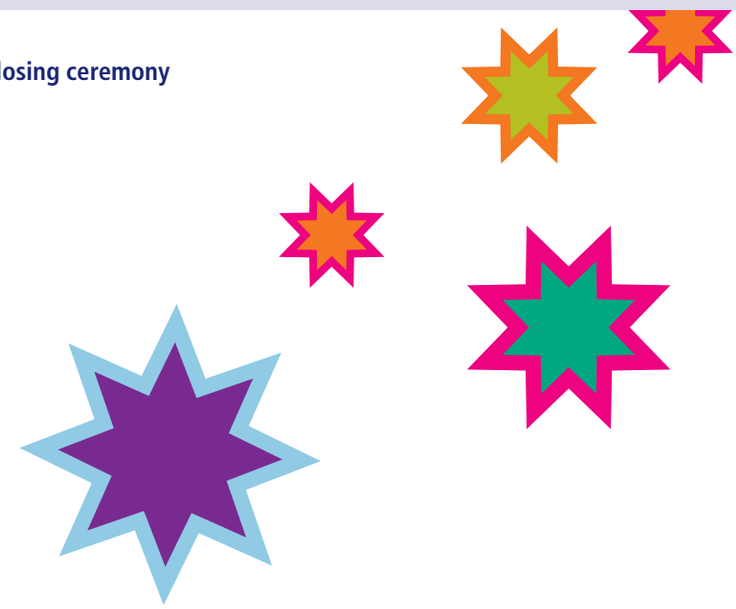
2. Evaluation forms or oral evaluation

- **For a written evaluation:** Ask the trainees to fill in the evaluation form. First go through the questions in plenary to ensure everyone understands the questions. Then encourage them to be honest and give you suggestions on what to improve for next time.
- **For an oral evaluation:** Stand in a circle. Invite volunteers to step into the centre to say something about the training, or to answer an evaluation question. Take turns. Make sure you have someone taking notes on the feedback, or make notes yourself. Encourage the trainees to ask each other questions about the training.

EXAMPLES OF EVALUATION QUESTIONS

- What did you like most about the training?
- What did you dislike the most?
- What would you have liked to learn more about, or what could the trainer have explained better/more about?
- What do you find the most important thing you learned during this training?
- What did you find the most difficult?
- What could the trainer improve for next time?
- Additional remarks or comments

3. Closing ceremony



Notes

Notes

Who we are

RUTGERS WPF

Rutgers WPF is a renowned expert centre on sexual and reproductive health and rights. We work towards a world in which all people are equally able to enjoy sexual and reproductive health and well-being, and exercise their sexual and reproductive rights. Central to our work is an open and positive attitude towards sexuality.

Rutgers WPF carries out activities in the Netherlands, Africa and Asia. Rutgers WPF supports partner organizations and professionals in their work, increasing their expertise on sexuality. Our activities are evidence-based, theoretically sound, culture and context sensitive, based on equality of gender, race, age and religion, and involve the participation of target groups.

Rutgers WPF evolved from the merger of the Rutgers Nisso Groep and the World Population Foundation (WPF). Rutgers WPF is a member of IPPF, the International Planned Parenthood Federation.

Rutgers WPF
PO Box 9022
3506 GA Utrecht
The Netherlands

Office address:
Oudenoord 176–178
3513 EV Utrecht
The Netherlands

tel: +31 (0) 30 231 34 31
fax: +31 (0) 30 231 93 87
email: office@rutgerswpf.nl
www.rutgerswpf.org

NL registered charity (CBF-keurmerk)
Chamber of Commerce No. 41193594

www.rutgerswpf.org