Monitoring: Meaning and Importance

Monitoring is essentially an on going process to ensure that the training programme is on track and that the pace and content of learning remain relevant to the group of learners. The pace of learning is closely observed to adapt its pace and depth to the requirements of learners.

As an on going assessment process, monitoring can take several forms:

* Predominantly, it is an exercise done by the trainers themselves; it may include a group of learners from time to time. The mechanism of a steering committee that reviews the day's proceedings at the end of the day is a practical example.

Field Illustration

At a leadership training for presidents of village forest committees, the facilitator asked for three volunteers each day, to form a steering committee. The responsibility of the steering committee was to monitor the progress of the day's proceedings, inside and outside the training hall. They were asked to informally enquire from other participants their opinions about the training programme, the day's sessions, and the methods used, about logistics and other administrative and learning related components. Each evening the steering team briefed the facilitator team about the perceptions of the participants and also provided suggestions for enhancing the effectiveness of the training programme. The steering team thus played an important role in guiding the training programme in right direction and at the correct pace.

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* Monitoring can also be done through daily or weekly reviews conducted in a somewhat more structured and formal manner. Clearly, one has to be on top of the learning process during the training in order to being able to utilize the feedback from monitoring.

* Monitoring by trainers and facilitators entails observing learning processes as they occur during a training programme. This observation can also focus on a specific individual or sub-group in order to ensure that they participate actively in the learning processes.

(Formal and more structured mid-term reviews can be undertaken during the training program to elicit a feedback from the participants. But this is not a substitute to the requirement of ongoing and continuous monitoring of the process of learning of various learners, their sub-groups etc.

Evaluation: Meaning and Importance

Evaluation in the context of participatory training means the systematic eliciting and analysis of feedback information about the relevance and impact of the training in order to assess whether learning or change has been effectively brought about. It is not aimed at being judgmental; rather, it brings out strengths and weaknesses. It helps to reflect on and consolidate present learning for participants, it also helps trainers modify and revise the programme, and strengthen future programmes.

Traditional evaluation practices seek passive involvement of learners, who are usually the objects of evaluation. The evaluation is often one sided, by the trainers, who may not even share results of the evaluation with learners.

Characteristics of Participatory Evaluation

- **Shared Control:** Both the learners and the facilitator maintain shared control over the process of evaluation.

- **Developmental:** It helps in strengthening the training programme by working out the difficulties faced by learners and trainers; it is intended as a developmental intervention.

- **Awareness raising:** It leads to a process of collective awareness-raising. All the learners and the trainers are aware of what is happening to them at a given point of time.

- **Empowering:** In this methodology, information is shared with the group and the learners maintain control over the process of evaluation. As an outcome, it becomes an empowering experience.

- **Mobilization:** Learners are motivated towards contributing to the effectiveness of the training programme through such an evaluation process.

The Evaluation Process

In evaluation of participatory training, we assess changes in the learners, and overall effectiveness of the programme, including the trainers. The assessment is not only during the programme but also after the programme is over.

In the context of learners

Some of the important aspects evaluated in the learners context include:

*   **Attitudinal change:**

    Has the training brought about any changes in the attitudes and values of the learner? Does the learner perceive certain significant changes in his/ her orientation to people, work, self-etc.? Is there a feeling of personal growth?

*   **Behavioral changes:**

    Have the learners shown any behavioral changes during the training programme? Have they noticed any behavioral changes at home / work after the programme?

*   **Conceptual development:**

    Has knowledge about relevant topics increased? Has that knowledge been useful during transactions at work? Has there been exposure to processes that the learner knew nothing about before the training?

*   **Performance changes:**

    Has the training contributed to an improved performance? Have there been any distinct changes in the functioning of the individual learner in the field of work?

In the context of Training Programme

Following are some of the important aspects, which we evaluate in the context of training:

*   **Training objectives:**

    Are the objectives realistic, simple and relevant? Have they been achieved? If so, to what extent?

*   **Contents and training methods:**

    Is the content of the program adequate and meaningful? Are the training

methods appropriate? Do they facilitate or hamper learning?

♦ **Group process:**

Are the groups functioning effectively? Is the group process contributing to learning or hampering it?

♦ **Trainers:**

Are the trainers keeping pace with the learners? Are they too slow or too fast? Are they sensitive to the learners' needs? Are they competent?

♦ **Learning materials:**

Are they well organized? Are the learners finding them relevant? Are materials appropriate to the contents?

♦ **Physical equipment:**

Is the training venue comfortable? Are the living arrangements suitable? Are the food arrangements satisfactory? Does the physical environment facilitate learning, or hamper it?

How to Evaluate?

It is important to obtain valid and authentic information for evaluation. Individual learners have their own indicators and standards for evaluating. Therefore, for evaluation, feedback can be sought from different sources; these may be primary and secondary sources.

Primary Sources	Secondary Sources
* The learner himself/ herself (first and major source) * Colleagues (people around the learner-at work and elsewhere) * Trainers (have seen learners closely)	* Diary (maintained by the learners and others during and after training) * Records (of training and related activities) * Reports of organisations (performance and progress reports)

When to Evaluate ?

Evaluation can be done daily, mid-term or immediately after the training and at specified intervals after the training.

Daily Evaluation (Monitoring)

* Daily evaluation is very helpful in identifying and resolving problems as they arise. One method to carry this out is to form a steering committee. Members either volunteer to be on the committee or are chosen by the group members. Membership could also be on a rotational basis, new members joining every day.

* The committee members seek information, reactions, feelings and suggestions from other members of the group throughout the day. They also keep track of what is happening during the session. At the end of the day, a meeting of the committee is held. Based on the concerns shared, solutions can be developed jointly and appropriate responsibilities can be taken to effect these changes.

* Sometimes, less structured ways of daily monitoring can also be used. For example, spending some time (say, half an hour) in the morning on such concerns could also be done to facilitate daily evaluation.

Mid-term Evaluation

* A quick evaluation may be held in the middle of a training programme. This

is a vital stage for consolidating the present learning, giving opportunity for catharsis to take place and ensuring the right direction for the remaining period of training.

- In a group, individual learners can share their feelings, concerns, new learning, their reactions to the content and process of the training, or any new aspects they would like to learn etc. The groups' stage in development can also be gauged in this way.

- Mid-term review can be done orally, through a questionnaire and/ or individual interviews. The results of this evaluation can be used both at the individual and group levels.

Immediately After the Training

- Soon after the training has been completed, an evaluation is held to assess its impact. This information must be elicited when experiences are fresh in the minds of the learners or it may be forgotten.

- This evaluation can be done through the oral sharing process in-groups, questionnaires, small group meetings and individual meetings. Suggestions for future training programmes can also be sought at this stage.

At Specified Intervals after the Training Programme

- Back home, after the training programme, the learner through his/ her practice can gain some additional insights into the training programme.

- To strengthen future training programs, such insights are very essential. The learners and the trainers can decide upon the method of sharing this feedback. A questionnaire or face-to-face dialogue, or both may be used.

Methods of Assessment

- **Oral sharing:** In this method, participants evaluate the training in pairs, threes, or groups. A set of parameters or a questionnaire is given to them. Each pair or small group can have a reporter, or a spokesperson. In a large group, the trainer may take notes.

- **Questionnaire:** A questionnaire is a series of written questions on a given topic. These questions are either open-ended or close-ended. Open-ended questions do not have the answers categorized into specific scales. Close-ended questions provide a scale (for example, good, satisfactory, poor)

- **Interview:** Interview is a face-to-face method of collecting information. Specific and concrete data can be generated through this process. This technique can also be used in a field setting to cross-validate information obtained through other sources.

- **Observation:** Observation techniques are useful methods of collecting data unobtrusively in a natural setting. Data about individual performance, group interactions and organizational culture can be collected by observation. A person observes and notes the information needed.

- **Records:** Organizations maintain numerous records that reflect the various stages of their performance and growth. Records are by definition information obtained second hand. However, records are still valuable sources of information for an evaluator. They provide the background information with which the evaluator can compare the results of the post-training phase.

It must be recognized that no one single method of data collection is complete in itself. In combination with different methods, valuable information can be obtained. The important thing is to obtain valid and authentic information from a variety of sources and methods. This provides the opportunity for crosschecking the information. Also the cost of obtaining information should be borne in mind when choosing methods. A trade-off may be necessary between the extent of information needed and cost of obtaining it.

Monitoring and evaluation at a glance

When?	What?	How?	Process
Daily	• Content, processes, session flow, logistics, language	• Mood meter • Recap • Large group discussion • Steering committee • Observations	• Monitoring
Mid-training	• Pace of learning, groups stages, design	• Using questionnaires • Large group discussion • With different groups of participants	• Monitoring & Evaluation
Post-training	• Achievement of objective • Learning • Material and logistics • Trainers • Understanding awareness and skills developed.	• Questionnaire • Large group discussion • Open space and standard considerations	• Evaluation
After some time	• Impact of training • Attitudinal and behavioral change • Follow-up support	• Field visits • Impact assessment study • Organizing meetings/ workshops	• Evaluation

Follow up of Training

Follow-up of the training programme is essentially meant to continue the process of learning initiated during the training programme. Each training programme creates a set of knowledge and ideas, which learners try to implement in their own situations. These efforts may require further support as follow-up.

Everything that is done by learners and trainers after the training programme does not constitute follow-up. Follow-up is any process of intervention and support provided to an individual and/ or group, to further enhance their learning process, for a specified period of time, following the training programme. Thus follow-up implies activities carried out to support the learning process after the training programme within a given time frame.

Follow-up to a training programme can be used for several purposes:

- Follow-up provides support, encouragement, knowledge and resources needed to implement the learning the learner acquires during the training programme.

- It helps to define additional learning needs during the period immediately after the training programme. It helps to continue the learning process by bringing out new learning needs.

- Follow-up is also used to assess the training programme and its impact on the learners, their work and their organizations. This helps the trainers in designing future training programmes.

- Follow-up provides an opportunity for the learners to consolidate their own experiences acquired during the training programme.

- In a broad sense, follow-up can also be used strategically. If training has larger objectives of social change, follow-up can be used in a strategic way to:

  a) Foster a feeling of solidarity among the like-minded activists and organization.

  b) Sustain the process and efforts of cadre building and formation of networks.

  c) Strengthen formation of small groups and facilitate a process of building a larger and stronger organization.

Methods of Follow-up

Follow-up can be conducted in different ways. It can be planned differently for each learner; it can also be done for the entire group of learners, it can be done for a selected sub-group as well. Methods of follow-up depend on its purpose and group of learners. Some possible methods are:

* Face to face interactions among learners themselves and between learners and trainers. Example, field visits by other learners or trainers to a site, meetings of just learners, as well as along with trainers, meetings of all learners or a sub-group. It may also involve conducting advance training, providing additional learning material, providing opportunity for apprenticeship, etc.

* The choice of the method should depend on the needs of the learners and availability of resources. Illiterate, rural and urban poor learners may require greater use of direct methods; project holders may be satisfied with indirect methods only. A combination of direct and indirect methods is generally very effective.

* It is important to plan for follow-up deliberately and consciously. It does not happen automatically. Broad follow-up plans should be considered at the time of developing the design of the program. Details of the follow-up can be again worked out at the end of the programme along with the learners.