switchboard
connecting resettlement experts

Sample Monitoring and Evaluation Onboarding Guide

Monitoring and evaluation (M&E) is the systematic process of collecting and analyzing data to track progress toward benchmarks of success and assess outcomes. **Monitoring** occurs regularly throughout a project to support timely adjustments, reporting, and accountability, while **evaluation** occurs at key milestones to assess overall results and the factors that influenced them. M&E staff play a role in project design and may be responsible for data collection and entry, data quality, analysis, reporting and compliance, data sharing, and internal learning.

This **Monitoring and Evaluation Onboarding Guide** is a framework for onboarding new staff members whose roles focus entirely on M&E or include a significant percentage of M&E-related tasks. It is meant to be customized to include organization-specific training, including any in-house procedures and guidelines, as well as funder requirements. This guide shares reading materials, recorded webinars, and other resources to complement your agency's or program's onboarding activities.

Introducing M&E, Project Design, and Evidence-Based Programming	
This first section introduces key concepts, definitions, and tools related to monitoring and evaluation.	
Due Date: Completion Date:	
Defining M&E and Related Terms	☐ **eLearning:** Introduction to M&E and Evidence-Based Programs ☐ **Read:** Monitoring and Evaluation Glossary
Project Design and Logic Models	☐ **Read:** Getting Started with Project Design and Logic Models ☐ **eLearning:** Introduction to Theories of Change ☐ **eLearning:** Introduction to Logical Frameworks ☐ **Read:** Introduction to Program Design: Developing Your Logframe ☐ **Read:** Introduction to Program Design: Developing Your Theory of Change or **Watch:** Introduction to Program Design: Developing Your Theory of Change ☐ **Review:** Four Steps You Can Take to Start Measuring the Success of Your Project ☐ **Review:** SMART Indicators Checklist, with Case Study ☐ **Review:** Indicator Matrix Template ☐ **Review:** Theory of Change and Logical Framework (Logframe) Templates

Evidence-Based Programming	☐ **Watch:** Introduction to Evidence-Based Project Design ☐ **Read:** Are Your Programs and Services Evidence-Based? Implementation Science can Help! ☐ **Read:** Implementation Science: Bridging the Evidence-to-Action Gap in Refugee Services ☐ **Watch:** Introducing the Switchboard Evidence Database ☐ **Read:** Enhancing Newcomer Support Through Evidence-Based Projects ☐ **Read:** Three Ways Evidence Summaries Can Transform Resettlement Work ☐ **Review:** Diagram: The Data-Driven & Evidence-Based Program Cycle

Data Collection and Management		
This section includes resources to help staff plan and execute data collection, establish data quality standards, and support staff members in completing data tasks.		
Due Date: Completion Date:		
Planning Data Collection	☐ **Read:** M&E Plan Template and Checklist ☐ **Read:** When's that Report Due Again? How to Develop a Monitoring and Evaluation Workplan ☐ **Read:** Data Collection Planning Worksheet ☐ **Read:** Balancing Monitoring and Evaluation (M&E) Priorities: Practical Tips on Data Collection for Compliance and Project Improvement ☐ **Watch:** Switchboard Shorts: From Getting the Data You Need, to Getting the Data You Want ☐ **eLearning:** Planning for Data Collection and Quality Assurance ☐ **Read:** Developing Key Evaluation Questions	☐ *Activity: Review your team's existing data collection plan and identify the data currently being collected.*

Data Collection Methods	☐ **eLearning:** Introduction to Data Collection Approaches and Methods ☐ **Read:** Quick Reference Table: Overview of Common Data Collection Methods ☐ **Watch:** Methods Matter: 4 Questions to Consider When Choosing Data Collection Methods ☐ **Read**: Planning Effective Surveys with Newcomers ☐ **Read**: Planning Focus Group Discussions ☐ **Read**: Using Participatory Methods for More Responsive Project Design and Monitoring and Evaluation (M&E)	☐ *Activity: Identify which data collection methods your team is already using, and brainstorm whether there are other methods that seem suitable for the data you are collecting. Identify any potential ways to make your data collection more participatory.*
Collecting Data from Clients and the Community	☐ **Read:** Collecting Client Feedback Data ☐ **Read**: Community Needs Assessments with Newcomers ☐ **Read**: Needs Assessment Training Handbook ☐ **Watch**: Rapid Community Assessments with Refugee Newcomer Populations	☐ *Activity: Has your team conducted a needs assessment recently? If so, review the data and familiarize yourself with your community's needs. If not, consider what learning goals you might set for a needs assessment, based on the services your team provides.*
Obtaining Informed Consent	☐ **Read:** Obtaining Meaningful Informed Consent from Newcomers ☐ **Review:** Sample Informed Consent Form	☐ *Activity: How should you adjust informed consent procedures for clients who are not literate? For minors?*
Supporting Timely and Quality Data Entry	☐ **Read**: Gaining Staff Buy-in for Data Collection and Entry ☐ **Read**: Improving Data Quality in Case Management Programs ☐ **Review:** Data Quality Assurance & Compliance Checklist ☐ **Review**: Sample Data Quality Assurance Standard Operating Procedures (SOPs)	☐ *Activity: Identify one way you can support your team in maintaining data quality.*

Using Data for Learning and Reporting		
This section includes resources for effectively using data to develop findings, generate action items to improve services or expand programming, and communicate with stakeholders.		
Due Date: Completion Date:		
Analyzing Data	☐ **Review:** Preparing for Data Analysis ☐ **Watch:** Introduction to Data Analysis for Learning and Program Improvement ☐ **Read:** Collecting and Analyzing Data for Learning and Program Improvement ☐ **Review:** Data Analysis and Action Planning Templates	☐ *Activity: In your own words, how does data help us maintain or develop effective resettlement programming?*
Reporting	☐ **Review:** Bar Charts and Beyond ☐ **Read:** Developing Strong Program Reports or **Watch**: 3 Steps for Developing Stronger Program Reports ☐ **Read:** Data Communication for Resettlement Organizations ☐ **Read:** Annual Reports	☐ *Activity: Reflect on how you communicate findings from data to different audiences. Can you adopt any of the strategies from these resources?*
Acting on and Communicating with Data	☐ **Review:** End-of-Project Learning Meeting Template ☐ **Watch:** Using Data for Strategic Consultation and Community Connectedness	☐ *Activity: Identify any processes your team already employs to review and implement action items based on findings from the data they collect.*

Please consult your supervisor or training officer about additional opportunities to continue learning as you progress in your role. Social learning opportunities, such as communities of practice or working groups, can also be a great way to exchange knowledge and learn from others. For example, Switchboard runs an M&E and Applied Research Community of Practice open to all resettlement staff who serve ORR-eligible populations in the United States. We encourage you to register for the Switchboard newsletter and engage with the many other resources on our website.

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