An Introduction to Monitoring

Lecturer: Nami Kawakyu

In this lecture, we will discuss what monitoring is and the role it plays in helping programs achieve its objectives.

What Is Monitoring?

Most of us already use monitoring in our day-to-day lives. There are examples all around us: families track their monthly spending to strategize on how to save money; doctors measure a patient's blood pressure at every visit to assess health changes; farmers monitor rainfall to forecast crop growth; and competitive runners track their distances and times to gauge progress. Frequent tracking of these common activities is often used to measure progress towards a set goal – saving money; lowering blood pressure; increasing crop yield; and increasing running speed.

We conduct monitoring, both in our everyday lives and in global health programs, because it gives us useful, routine information about a specific situation over a period of time. That information tells us if things are changing, for example, is the situation getting better or worse?, which, in turn, helps us make more informed decisions about what to do next.

When it comes to programs, **monitoring** can be defined as the ongoing, routine collection and analysis of data about a program's activities in order to measure program progress. Monitoring is concerned with answering the fundamental question, "what are we doing?" Monitoring usually focuses on the processes that occur during implementation.

Monitoring data commonly come from readily available, **routine data sources**, such as health information systems or service records such as logbooks and patient registers. Programs may also obtain monitoring data from routine program records and reports, like training reports, inventories, employment records, or meeting minutes.

Monitoring **deliverables** include tables that contain information on activities conducted and their associated indicators, as well as charts and/or graphs to depict changes over time.

Why Is Monitoring Important?

Monitoring is essential to ensuring effective programs because it allows you to:

- Track activities and performance over time, such as what activities are being carried out, to whom, where, when, and how frequently
- Identify if activities are being implemented as planned and on time

- And most importantly, make informed, timely decisions based on data, including improving programs by identifying which aspects are working well and which require adjustments

Monitoring in Practice

Let's consider an example of what program monitoring looks like in practice. Imagine you are working on a social marketing campaign to reduce anemia among Cambodian secondary school girls by increasing iron-folic acid (IFA) supplementation. The campaign includes the following activities: participating secondary schools will be decorated with banners carrying messages about the weekly supplementation; dignitaries will give supportive speeches to the schools; select students will be trained to be peer educators; and teachers will be chosen to attend peer educator training in order to provide support for the student leaders. In addition, monthly committee meetings will be held with peer educators and chosen teachers. A nominal fee will be charged for one month's supply of supplements. Your program only plans to conduct a survey before the intervention begins and follow up with a survey to assess girls' knowledge, attitudes and practices regarding iron-folic acid supplementation. These are useful first steps for evaluating the effectiveness of the campaign. Now, take a moment to put yourself in the place of the program manager: do you think the survey data will supply you with sufficient, timely data to assess the progress of the campaign? [pause].

No, it would not. The reason is because you would not see the findings until *after* the campaign was over. So how will you know if you need to take corrective action *during* the campaign [break] You guessed it: you need to monitor!

Let's think about some examples of things you'd want to monitor during this program. You might begin by tracking some basic data on major activities to get a sense of whether or not the program is being implemented as planned, such as: number of peer educators and teachers who complete the training; monthly meeting attendance; attendance at key events; and the number of banners displayed. To give you a sense of the demand being created, you could collect monthly data from each school on the number of girls who request IFA supplements.

Now, imagine that some schools have high numbers of girls who request supplements each month and some have low numbers. How can you use monitoring to help figure out what's going on? You could decide to visit sites to assess the situation at schools reporting the lowest numbers. Could it be a communications issue? Maybe there was insufficient training of the peer educators at those schools and as a result, they have not been promoting the supplements to their peers as planned. Perhaps, banners have been torn down or were never hung up in the first place. Alternatively, it could be a reporting issue. Perhaps many girls *did* request the supplements, but the data were not properly recorded in the logbooks.

Regular monitoring helps you detect obstacles like these and make data-driven decisions about how to address them. A program may remain on course or change significantly based on the data obtained through monitoring. In our supplementation example, let's say monitoring revealed that a handful of peer educators had been sharing inaccurate information about the supplements, and as a result, some students were afraid to take them. Therefore, you would need to strategize about how to address this issue through new activities. Maybe the activities include giving select peer educators additional training, dispelling the inaccurate information through a school-wide assembly, or creating new banners. Whatever you'd choose to do, these new activities should be reflected in your program's work plan. Similarly, those activities should be monitored in your M&E plan to ensure you complete the re-trainings you intend to do, hold the number of assemblies you expect to, or hang up the desired number of banners at each target school.

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