

Ministry of Education

Monitoring, Evaluation and Reporting Mechanism Resource Booklet

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The Purpose of the Monitoring, Evaluation and Reporting Mechanism Resource Booklet

This document has been prepared to provide essential information on the Monitoring, Evaluation and Reporting procedures being used within the Ministry of Education. This Resource Guide will support standardisation in the implementation of the Monitoring, Evaluation and Reporting Mechanism by Ministry of Education officials, leading to better results and an improved operation.

Significance of Monitoring, Evaluation and Reporting Mechanism

Year after year, the Ministry of Education places its primary focus on improving the performance of the education sector. In order to facilitate improvement, it has become necessary for the decision making process to be informed by empirical data which has enhanced the design and implementation of education policies and programme and improved the process of resource allocation, while promoting greater levels of efficiency, accountability and transparency.

Building an effective monitoring and evaluation system that employs a mechanism that supports these efforts is essential to achieving success in education. The continuous process of collecting and analyzing relevant data which can allow for the tracking of the system's progress towards achieving its goals is the focus of the *Monitoring* process. *Evaluation* builds on this by using the results of the monitoring process to draw meaningful conclusions as well as offering recommendations.

Using an effective monitoring and evaluation mechanism will enable decision-makers in education to ask and answer the key questions of how, why, or by what means enhancements in performance were achieved. Further, concerns about the impact, relevance, sustainability, effectiveness and efficiency of an intervention can be addressed. Thus, an effective monitoring and evaluation mechanism is vital to the strengthening of the entire education sector.

After conducting a readiness assessment recently in the MOE, Dr. Una Paul, international consultant for Monitoring and Evaluation, developed a Monitoring and Reporting Mechanism for officers involved in the delivery of education in The Bahamas. This mechanism has been enhanced through consultation and collaboration with senior policy makers and the persons who will be intimately involved with its implementation.

Implications of the Monitoring, Evaluation and Reporting Mechanism

The Mechanism reflects an iterative approach to communication, monitoring and reporting as it spans across all levels of management of MOE from the policy level to actual implementation at the school level (top down/bottom up, and multi directional). It speaks to the levels of education managers directly involved in the delivery of education, from the Director of Education through to the School Principal and aims at forming linkages among the various echelons of the system.

It is expected that this mechanism will establish the standard procedures that will be followed in giving and receiving feedback as well as monitoring the outcomes of strategies implemented during the delivery of education in our system. Once the data is collected, analysed and reported as outlined in the Monitoring and Evaluation Mechanism, then the Planning cycle for the education sector will be strengthened.

As policy decisions and priorities are transformed into programmes and projects, operational strategies and implementation strategies must be monitored at all levels of delivery. At the implementation levels, inputs, activities and outputs are the focus for the monitoring process. At the levels that we examine results, outcomes and impact are the focus. The strategies to carry out policies, programmes and projects at these levels, fall into two operational areas that involve School Administrators and District Superintendents on the one hand, and Education Officers and Assistant Directors of Education on the other. The benefits of implementing proper monitoring and evaluation systems must be seen by those involved in their implementation if they are to be successful.

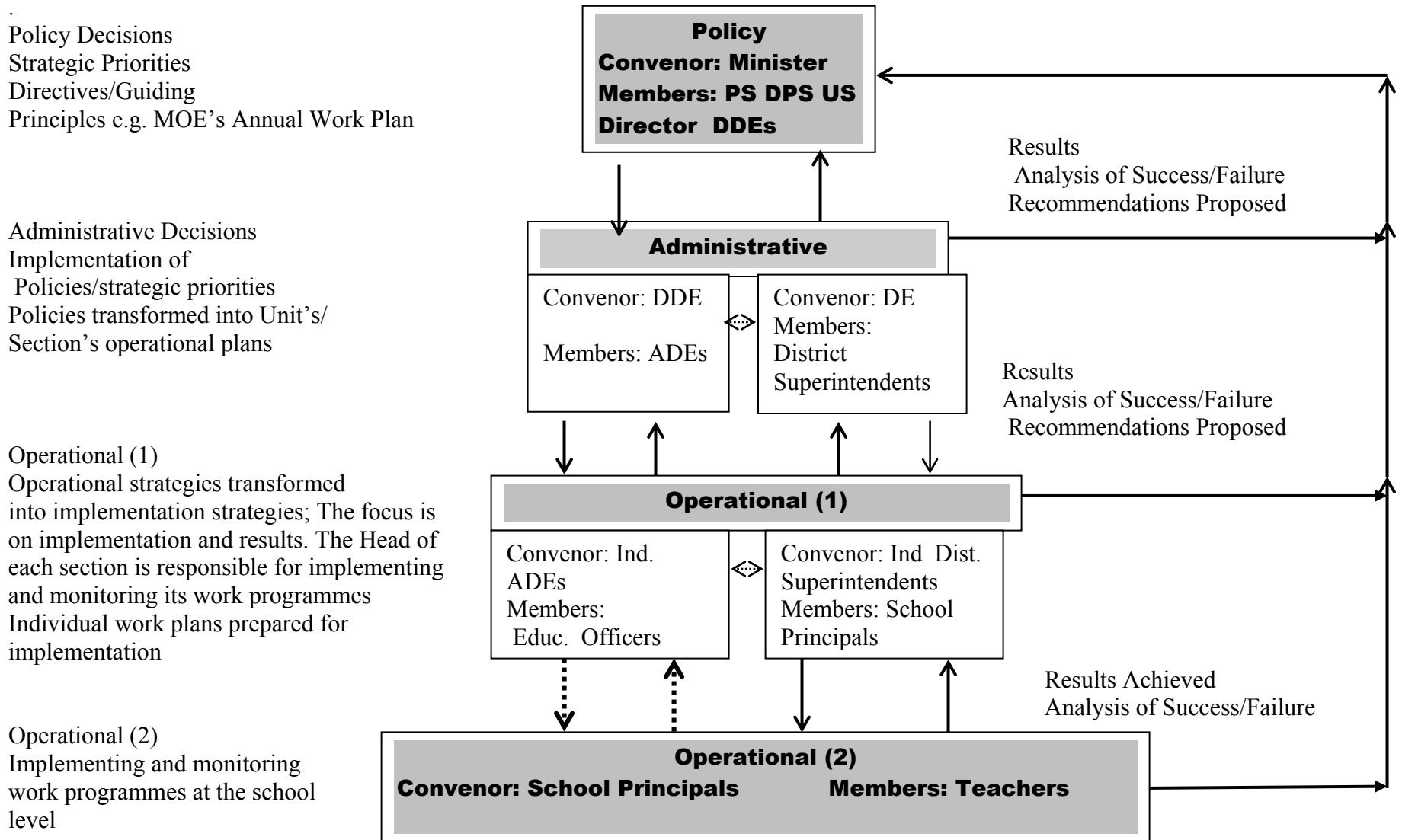
EXPLANATION OF THE M&R MECHANISM

The Communication, Reporting and Monitoring Mechanism shown in the Figure 1 (overleaf), reflects four main levels of management. This Mechanism establishes the standard procedures that will be followed in giving and receiving feedback as well as monitoring the outcomes of strategies implemented during the delivery of education in our system.

The mechanism employs monitoring and reporting tools that assist in analyzing work done at the operational and administrative levels. These tools, developed in consultation with the Assistant Directors of Education, District Superintendents and Senior Officers in the Department of Education during recent capacity building workshops in monitoring and evaluation, will enhance the process for successful implementation of programmes and policies.

Monitoring the Delivery of Education in The Bahamas

Figure 1: Communication, Reporting and Monitoring Mechanism DRAFT



Each ADE, as section head, is responsible for overseeing the implementation of work programmes developed by the curriculum officers. Each curriculum officer develops and submits an *Annual Work Plan* (AWP) which reflects the subjects/units for which he/she has responsibility. The ADE develops an AWP that is a composite of those annual plans prepared by the curriculum officers whom they supervise. The AWP comprises:

- several (five for most curriculum officers) broad programme areas;
- an overview of the section's work;
- the subjects that comprise that section;
- objectives;
- main implementation strategies,
- target dates; and
- expected outcomes and performance indicators.

The main strategies for achieving the objectives can be made more specific by including the inputs (financial, human and material resources) that would be needed to carry them out. For example expenses anticipated for Family Island travel in visiting classrooms for supervision of the instructional programme.

The five broad programme areas that the ADEs and officers of the Curriculum Section focus on include:

Programme Area I:	Curriculum Review and Development
Programme Area II:	Professional Development Initiatives
Programme Area III:	Procurement, Development and Distribution of Instructional Materials
Programme Area IV:	Supervision of the Instructional Programme
Programme Area V:	Subject Promotional Activities

The five broad programme areas that the ADE and officers of the Learning Resources Section focus on include:

Programme Area I:	Programme Review and Development
Programme Area II:	Development of Multimedia Instructional Resources
Programme Area III:	Procurement & Distribution <i>(limited to Lower Primary Officer)</i>
Programme Area IV:	Supervision of the Instructional Programme <i>(limited to Lower Primary Officer)</i>
Programme Area V:	Unit Promotional Activities

**The Commonwealth of The Bahamas
Ministry of Education
Curriculum Division
Annual Work Plan Template**

Section: _____ **Supervisor:** _____

Academic Year: _____

Broad Programme Area: _____

Overview: _____

Subject/Unit	Objectives	Main Implementation Strategies	Target Dates		Expected Results	Performance Indicators
			Start	Stop		

Submitted by: _____ **Post:** _____

Date: _____

(AWP for ADEs and Curriculum Officers)

The District Superintendents deal specifically with the delivery of education at the district level. They monitor and evaluate the implementation of policy, programmes and projects at this operational level and develop strategies of their own that would cause the schools to reflect the mission of the Ministry of Education. Their AWP's are developed and submitted at the beginning of the school year in September. The work plans cover five broad areas of responsibilities. These include:

Programme Area I:	Management of Physical/Non-Human Resources
Programme Area II:	Supervision and Evaluation of Instructional Programme
Programme Area III:	Supervision, Management and Development of Human Resources
Programme Area IV:	Promotion of Policy, Programmes and Projects
Programme Area V:	Public Relations and School/Community/District Partnerships

These programme areas are further broken into Focus Areas for which objectives, strategies and performance indicators are developed. Each will have target dates that will guide implementation and achievement. Again estimated inputs (financial, human and material resources) may be included with the main strategies outlined in the *Annual Work Plan* format.

**Department of Education
Annual Work Plan Template for District Superintendents**

District: _____ Academic Year: _____

Overview: _____

Broad Programme Areas: _____

Focus Area	Objectives	Main Strategies	Required Resources	Target Dates		Expected Results	Performance Indicators
				Start	Stop		

District Superintendent's Signature: _____

Date: _____

Director of Education's Signature: _____

Date: _____

(AWP for DS)

Progress Reports, to be submitted twice per year by ADEs, curriculum officers, Officers of the Special Services Section and District Superintendents, will provide evidence of the implementation of the objectives stated in the ***Annual Work Plans***. All unscheduled activities, that is, activities not included in the ***Annual Work Plan*** are included in the ***Progress Reports*** and noted as such (unscheduled activities). As with the AWP, the curriculum officers and special services officers submit to their respective ADEs and the ADEs submit to the DDE (Curriculum and Instruction). District Superintendents will submit to the Director of Education. (See Appendix I: **Schedule of Due Dates For Plans and Reports**)

The Annual Report which gives account of the entire Academic Year consists of:

- Objectives;
- Expected Results;
- Results Achieved;
- Reasons for Results Achieved and
- Recommended Course of Action.

These are reflected for each Broad Programme Area. In addition, there is an Executive Summary written for the Subject/Unit Area (s) for which the officer is responsible. Lessons Learned and Recommendations are included for each of the Broad Programme Areas at the end of the Report with Name of Officer, his/her Post and the Date of submission.

The template for the Annual Report which is completed by the Curriculum Officers and their ADEs follows the Progress Report for the Curriculum Section below, along with a sample Annual Report.

**The Commonwealth of The Bahamas
Ministry of Education
Curriculum Division
Progress Report Template**

Section: _____ **Supervisor:** _____

Academic Year: ____ **Period (✓) Tick as Appropriate: Sept. to Dec** **Jan to June**

Broad Programme Area: _____

Overview

Lessons Learnt: _____

Subject/Unit	Objectives	Results Achieved	Reasons for Results Achieved	Recommended Course of Action

Recommendations: _____

Submitted by: _____ **Post:** _____ **Date:** _____

(Progress Report for ADEs and Curriculum Officers)

**The Commonwealth of The Bahamas
Ministry of Education
Curriculum Division
Annual Report Template**

Section: _____ **Supervisor:** _____

Academic Year: _____

Executive Summary: (Includes main thrust, or focus for the year, highlights and achievements)

Broad Programme Area: _____

Subject/Unit	Objectives	Expected Results	Performance Indicators	Results Achieved	Reasons for Results Achieved	Recommended Course of Action

Broad Programme Area: _____

Subject/Unit	Objectives	Expected Results	Performance Indicators	Results Achieved	Reasons for Results Achieved	Recommended Course of Action

Broad Programme Area: _____

Subject/Unit	Objectives	Expected Results	Performance Indicators	Results Achieved	Reasons for Results Achieved	Recommended Course of Action

Lessons Learnt: Curriculum Review, Development

Professional Development Initiatives

Procurement, Development and Distribution of Instructional Materials

Supervision of Instructional Programme

Subject Promotional Activities

Recommendations: Curriculum Review, Development

Professional Development Initiatives

Procurement, Development and Distribution of Instructional Materials

Supervision of Instructional Programme

Subject Promotional Activities

Submitted by: _____ **Post:** _____ **Date:** _____

(Annual Report for ADEs and Curriculum Officers)

Broad Programme Area: Procurement, Development and Distribution of Instructional Materials

Subject/Unit	Objectives	Expected Results	Performance Indicators	Results Achieved	Reasons for Results Achieved	Recommended Course of Action
Religious Studies Unit Primary	To develop resource packets for Religious Studies	Back to School Resource packets developed	144 Primary Religious Studies Resource packets distributed to Family Island schools by July 2009	0 Primary Religious Studies Resource packets delivered to New Providence Schools by July 2009	Publisher shipped half of materials for packets to wrong country. Materials still being rerouted.	Request Publisher reissue entire order or purchase from different company for new school year.

Broad Programme Area: Supervision of Instructional Programme

Subject/Unit	Objectives	Expected Results	Performance Indicators	Results Achieved	Reasons for Results Achieved	Recommended Course of Action
Religious Studies Unit Primary	To assess the quality of primary school instruction in Religious Studies	The quality of primary school instruction in religious Studies assessed	25 of 30 detailed reports on classroom visits on F.I. completed by July 2009	18 detailed reports completed by July 2009	Family Island travel budget cut due to recession.	Identify officers on F.I. who are able to conduct assessment and forward reports.

(Sample of part of Annual Report)

**Department of Education
Progress Report**

District: _____ **Academic Year:** _____

Broad Programme Area: _____

Focused Area	Objectives	Results Achieved	Reasons for Results Achieved	Expected Results	Recommended Course of Action

Overview: _____

Lessons Learned: _____

Recommendations: _____

District Superintendent's Signature: _____ Date: _____

Director of Education's Signature: _____ Date: _____

The Special Services Section of the Ministry of Education is charged with the administrative responsibility of providing support to our schools in the areas of Special Education, (including special schools, alternative programmes and specialized units), School Psychology, Speech Therapy, Guidance and Counseling and School Attendance.

Since services are provided in the five Broad Programme areas listed above, work programmes must be planned, implemented, monitored, evaluated and reported on each Academic Year.

As mentioned, the five broad programme areas include:

- ***Programme Area I: Speech/ Language Pathology***
- ***Programme Area II: Guidance and Counseling***
- ***Programme Area III: Special Education***
- ***Programme Area IV: Educational Psychology***
- ***Programme Area V: School Attendance***

Each officer of this section develops and submits an AWP for which he/she has responsibility. These AWPs are comprised of:

- Broad Program Areas
- Focus Areas
- Objectives
- Main Tasks/Strategies
- Required Resources
- Target Dates
- Expected Results and
- Performance Indicators

The inputs which are based on the assumptions made during the evaluation stage of the planning process as well as the past experiences of the officers, (financial, human and material resources) are the Required Resources outlined in the *Annual Work Plan* format. The Officers of the Special Services Section submit their work plans to the ADE of the section and they follow the same schedule outlined for the Curriculum Officers and other ADEs of the Department of Education.

**Ministry of Education
Annual Work Plan Template for Special Services Section**

Broad Programme Area: _____ Academic Year: _____

Officer: _____

Focus Area	Objectives	Main Tasks/Strategies	Required Resources	Target Dates		Expected Results	Performance Indicators
				Start	Stop		

Overview: _____

Submitted By: _____ Date: _____

ADE-Special Services: _____ Date: _____

Collaborative sessions held with the ADE and officers of the Special Services Section have resulted in the format for the Progress Reports reflecting the following components:

- Broad Programme Areas
- Focus Areas
- Objectives
- Results achieved
- Reasons for Results Achieved
- Expected results
- Challenges
- Recommended Course of Action
- Lessons Learnt
- Overview
- Recommendations

The Progress Report provides evidence of the implementation of the objectives stated in the *Annual Work Plan*. Changes are tracked in this way, as successes and failures, strengths and weaknesses are noted. *The Evaluation process* takes place as we document and subsequently analyze “Reasons for Results Achieved”.

The *Annual Report* gives an account of the entire Academic Year. The format consists of the same basic features as the Progress Report with the addition of an Executive Summary of the Broad Programme Area for which the Officer is responsible. It is possible that one officer may be responsible for more than one Broad programme Area. If this is the case he/she must complete the format for each of the areas. This can be done in the same Annual Report completed by the officer.

The formats for the *Progress Report* and the *Annual Report* to be completed by the Officers of the Special Services section follow.

**Ministry of Education
Special Services Section
Progress Report Template**

Broad Programme Area: _____

Academic Year: _____ **Period (✓) Tick As Appropriate: Sept. to Dec.** **Jan. to June**

Focus Area	Objectives	Results Achieved	Reasons for Results Achieved	Expected Results	Challenges	Recommended Course of Action

Overview: _____

Lessons Learned: _____

Recommendations: _____

Officer's Signature: _____

Date: _____

ADE's Signature: _____

Date: _____

**The Commonwealth of The Bahamas
Ministry of Education
Special Services Section
Annual Report Template**

Officer: _____ **Academic Year:** _____

Executive Summary: (Includes main thrust, or focus for the year, highlights and achievements)

DRAFT

Broad Programme Area: _____

Focus Area	Objectives	Results Achieved	Reasons for Results Achieved	Expected Results	Challenges	Recommended Course of Action

Broad Programme Area: _____

Focus Area	Objectives	Results Achieved	Reasons for Results Achieved	Expected Results	Challenges	Recommended Course of Action

Lessons Learnt:

1. School Attendance

2. Psychology

3. Guidance & Counseling

4. Speech/Language Pathology

DRAFT

Recommendations:

1. School Attendance

2. Psychology

Officer's Signature: _____

Date: _____

ADE's Signature: _____

Date: _____

DRAFT

Appendix I

SCHEDULE OF DUE DATES FOR PLANS AND REPORTS

Responsibility	Annual Work Plan	1st Progress Report	2nd Progress Report	Annual Report
<i>Assistant Directors of Education</i>	September 25, 2009	January 29, 2010 (Sept.-Dec.)	August 2, 2010 (Jan.-June)	October 23, 2010
<i>District Superintendents</i>	September 25, 2009	January 29, 2010 (Sept.-Dec.)	August 2, 2010 (Jan.-June)	NA
<i>Curriculum Officers</i>	September 11, 2009	January 15, 2010 (Sept.-Dec.)	July 19, 2010 (Jan.-June)	October 9, 2010

Appendix II

EXPLANATION OF CONCEPTS AND TERMS

Activities: actions taken in the context of programming through which inputs (financial, human, technical and material resources) are mobilized to produce specific outputs or contribute to the outcome.

Analysis: the process of systematically applying statistical techniques and logic to interpret, compare, categorize, and summarize data collected in order to draw conclusions.

Capacity Building: the process by which individuals, groups, organizations and countries develop, enhance and organize their systems, resources and knowledge— all reflected in their abilities (individually and collectively) to perform functions, solve problems and set and achieve objectives.

Data: specific quantitative and qualitative information or facts.

Evaluation: an assessment of a planned, ongoing, or completed intervention to determine its relevance, efficiency, effectiveness, impact and sustainability for data driven decision making.

Feedback: the findings of monitoring and evaluation activities used to improve programme management, decision making and organizational learning. The return of information about the result of a process or activity;

Finding: factual statement about a programme or project based on evidence gathered through monitoring and evaluation activities.

Goal: The higher order objective to which a development intervention is intended to contribute.

Impact: Long term effects on identifiable population groups produced by an intervention, directly or indirectly, intended or unintended. These effects can be economic, socio-cultural, institutional, environmental, technological or of other types

Indicator: an indicator is a quantitative or qualitative signal or measure that provides a simple and reliable basis for assessing achievement, change or performance.

Inputs: the financial, human, material, technological and information resource provided by stakeholders (i.e. donors, programme implementers and beneficiaries) that are used to implement a development intervention.

Lesson learned: learning from experience that is applicable to a generic situation rather than to a specific circumstance.

Means of Verification (MOV): the specific sources from which we determine the status of each of the indicators.

Monitoring: a continuous process of collecting and analyzing information for comparing actual performance against what was planned or expected.

Objective: a generic term usually used to express an outcome or goal representing the desired result that a programme seeks to achieve.

Outcome: the intended or achieved short and medium-term effects of an intervention's outputs, usually requiring the collective effort of partners. Outcomes represent changes in conditions which occur between the completion of outputs and the achievement of impact.

Outputs: the products and services which result from the completion of activities within an intervention. Outputs relate to the completion (rather than the conduct) of activities and are the type of results over which managers have a high degree of influence.

Programme: a time-bound intervention similar to a project but which cuts across sectors, themes or geographic areas, uses a multi-disciplinary approach, involves multiple institutions, and may be comprised of several projects designed to bring about a predetermined impact.

Recommendation: proposal for action to be taken in a specific circumstance, including the parties responsible for that action.

Result: the output, outcome or impact (intended or unintended, positive and /or negative) derived from a cause and effect relationship set in motion by a development intervention.

Stakeholders: people, groups or entities that have a role and interest in the aims and implementation of a programme. Mainly decision makers and supporters who influence or decide the course of action related to the programme.

Strategies: approaches and modalities to deploy human, material and financial resources and implement activities to achieve results.

Work Plans: quarterly, annual, or multiyear schedules of expected outputs, tasks, timeframes and responsibilities. It is used as a monitoring tool to ensure the production of outputs and progress towards outcomes.

Sources

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