Ministry of Water Resources M&E Guidelines
12 Components of Organizing Framework for a Functional M&E System

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Ministry of Water Resources’ M&E Guideline

Water Directorate
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Foreword

About these Guidelines and what they are meant for
The overall objective of these guidelines is to facilitate monitoring and evaluation of the Ministry of Water Resources’ service delivery activities and business processes with a view to enhancing the efficiency and effectiveness and maximizing the impact of their development programmes and interventions of our beneficiary, thereby developed a national objective of economic growth, poverty reduction, and sustainable development of Sierra Leone.

These Guidelines are meant to aid, inform and guide planning, programming and programme implementation by Ministry of Water Resources. Specifically, these Guidelines are aimed at:

a) Improving the quality of development planning, management and decision-making amongst stakeholders, including policy makers at the national, regional and local levels, as well as professionals and local level practitioners;

b) encouraging a results-based management for improved WASH services delivery and public resource management;

c) increasing accountability and transparency in Ministry of Water Resources’ operations and performance management; and

d) enhancing the effectiveness of information flow and management between our ministry and patterner, and thus facilitating the monitoring of progress in the implementation of such national policies, strategies and programmes as the Agenda for Prosperity (A4P) and sector policies and strategies;and progress toward the attainment of the Millennium Development Goals(MDGs)

Who are the Guidelines meant for?
These guidelines are meant to assist in the monitoring and evaluation of programmes, projects and service delivery activities of Ministry, and are targeted at, but not meant exclusively for, the M&E Units of the Ministry. We could also collaborative, supervisory and oversight institutions and agencies GVWC, SALWACO and INGO/NGO.

Monitoring and evaluation of projects should be done by the M&E unit in conjunction with the relevant departments of the Ministry, and in collaboration with the M&E structures of devolving and/or supervisory MDAs, including MLGRD, MoHS, MEST, MoFED, and; Statistics Sierra Leone, etc. all of which should serve as both sources of information which they generate and/or collect, and recipients of information that they may need from the ministry. These Guidelines could be useful to all of these, by clarifying issues, including the role of M&E and the institutional and functional relationships among stakeholders.

What are the Guidelines based on?
These Guidelines have used a Logical Framework (logframe) approach to Monitoring and Evaluation. The logframe is useful in the design and planning, implementation, and monitoring projects and programmes because it brings together in one place clear, concise, visible and accessible statements on all the key components of a project/programme, making it easier to report on the implementation of the project and its achievements, highlight any changes, and make adaptations accordingly.
How the Guidelines are organized

The Guidelines are organized

To facilitate the users’ understanding of basic concepts and terminologies used in M&E, and thereby enhancing her understanding of the overall M&E process, a ‘Glossary of Key Concepts and Terms in Monitoring, Evaluation and Results-based Management’ has been compiled and annexed to these guidelines as Annex I.

Annex II is a comprehensive Monitoring Framework of indicators, and monitoring arrangements for Ministry of Water Resources by Sector and Thematic Area. These were compiled (and adapted where appropriate) from the relevant M&E frameworks in the various national and sector policies, strategies on which Ministry of Water Resources’ development plans and service delivery programmes are anchored.

I Introduction - Basic Concepts and Terminology

For a start, it is important for users of these guidelines to be equipped with some clarifying words of advice on various concepts, conceptions, perceptions and perspectives to Monitoring and Evaluation

Ministry and Ministries Officials should understand the role of Monitoring and Evaluation in the whole development process

It is important for M&E officials to understand not only their roles and responsibilities, but their limitations as well, in the M&E system

It is equally important for all stakeholders in the M&E Unit to understand how crucial the input of others is in the effectiveness of the M&E system

To appreciate the thrust and usefulness of these Guidelines, it is important for the various staffs and Ministry officials to understand their varying degrees of responsibility, control, spheres of influence and accountabilities for, or with respect to, Inputs, Output, Outcomes and Impact in the policy formulation, planning, plan implementation and general service delivery activities in their respective localities.

Types and Levels of Monitoring and Evaluation
- Input and process M&E (quality and efficiency), Output M&E (post-implementation maintenance); Outcomes and Impact M&E; Ex-post evaluation, mid-term reviews, etc.
- Monitoring of Ministry Projects
- Monitoring of Devolved Functions
- Monitoring of Donor-Supported Projects/Programmes

Basic Concepts in Monitoring and Evaluation

The Logical Framework as the Basis for Monitoring and Evaluation

Profiles of Indicators for Various Types of M&E of Ministry of Water Resources
1.2 Impacts, outcomes, Outputs; Goals, Purposes, Deliverables – What do they mean?

To facilitate a better understanding of project management (and hence, M&E) terminology, we will differentiate between Impact, Outcome and Output in terms of the logical levels of Goal, Purpose and Deliverables. It has also been seen that such concepts as Policies, Strategies and Objectives, and inputs, Outputs and activities are sometimes confused in the process of project/programme design.

The project/programme Goal is the ultimate reason for which the project is being undertaken, which is normally denominated in terms of the “Impact” the project makes or is likely to make on the target beneficiaries. It reflects the bigger picture perspective to development planning and programming, be it at national level, or at sector, council or department level.

Project/programme Purpose - the direct impact expected to be achieved as a result of the outputs produced by this project, denominated in terms of “Outcome”.

The Deliverables of a project/programme come in the form of the Outputs produced as a result of the project/programme implementation. They are usually tangible results that derive directly from implementation inputs and activities. The deliverables/outputs are usually within our control and sphere of influence, their qualities, quantities and timing depending on the conceptual soundness of the project design and the efficiency and effectiveness with which project execution is undertaken.

Activities are on the input side of the programming cycle and come in the form of combinations of human, financial and material resources, the appropriate combinations and utilizations of which result in programme/project outputs/deliverables.

We will attempt to further clarify these terms with an example. Suppose that, in Mambolo there is a high incidence of diarrhoea caused by the lack of a good and safe drinking water, and that a project is formulated by the Kambia District Council to improve the quality, quantity and distribution of potable drinking water in the area, while providing counseling in personal hygiene practices.

We may consider a project with (say):

Outputs – Construction of twelve (12) hand dug wells fitted with an appropriate mechanism for getting the properly treated water from the wells and Six (6) trained local health workers within a period of four (4) weeks.

Outcome - Improved Hygienic Practices (shown at the Purpose Level in the project Logical Framework), and

Impact - Reduction in the incidence of Diarrhoea (shown at the Goal Level in the project Logical Framework)

Inputs – Local labour, machine hours of drilling, training, all of which having budgetary implications in Leones.

The desired levels of planned performance are stated (in terms of quantity (12 wells and 6 health workers), quality (properly treated water) and time (4 weeks) as Objectively Verifiable Indicators. The process of assessing the level of performance achieved (impact) is known as Evaluation.
A more comprehensive Glossary of M&E concepts and terms is attached as Annex I to the Guidelines to help the user understand and appreciate the various issues, concepts and terminology in daily use in monitoring and evaluation, and in management. It is hoped that the glossary will be useful to all users of this manual, including Engineers, and staffs.

1.3 Evaluation

There are three essential sequential elements for evaluating a project/programme

1. Identification and definition of the **Indicators** and their **Baseline** attributes (at design stage).
2. Defining the planned level of performance – the **Targets** (at design stage).
3. Evaluating the performance of the programme to determine whether the targets have been met in respect of the indicators identified and as set during project design.

**Evaluation Methods:**
Programme Evaluation is conducted at two different levels, as follows:

(i) **The Efficiency Test** – to Determine whether a project/programme has achieved its intended goals, and if not, why not.

(ii) **The Impact Test** - Assessing the reach of a programme, in terms of pre-defined indicators, on the targeted beneficiaries

**Types of Evaluations:**
Evaluations can be conducted at several stages in a project/programming life cycle:

a. **Ex-Ante Evaluation**–focuses mainly on the project/programme design and plan to determine its soundness and consistency with expected performance. It questions the strategy used as the basis for design, and the research/theoretical foundation basis of the strategy. It also looks at the relative potentials of alternative strategies and approaches from the standpoint of relevance, technical, financial and institutional feasibility, as well as socio-economic value. The essence of this type of evaluation is for **quality assurance** mainly.

b. **Mid-Term Evaluation** seeks to determine, based on an analysis of the deliverables of the programme, at its mid-point, whether the programme is likely to achieve its stated objectives. Depending on the outcome of such evaluation, implementation will be continued as planned, or major changes may be made to the implementation details or schedule, or the project may even be aborted if adjudged to be unachievable or not cost-effective, either due to design defects, or due to significant changes in the design environment that render the project unfit for purpose.

c. **Ex-Poste Evaluation** is conducted sometime after the programme is completed, when the expected impact is likely to be measurable. Its purpose is to study the impact of the programme, using defined performance indicators, and to draw conclusions for similar interventions in the future (lessons learned).

**The Evaluation Framework:**
- **The Logical Framework** and benchmark/indicator guidelines, introduced at the project preparation (or design) stage.
- A framework incorporating the concepts of continued rationale, efficiency, effectiveness, effects and lessons learned, which is used during implementation/completion and after the completion stages for ex-post evaluations and reviews, and

- A framework featuring areas of summative evaluation (strategy, policy, programme, design, monitoring and execution, procedures, performance, sustainability) used in the ex-poste stage for impact evaluation.

Scope of Evaluations:
The Agenda For Prosperity (A4P) is further decomposed into sector strategic plans, which may be further decomposed into a number of logically related programmes, and programmes into projects. Programme/project development and performance parameters are normally defined in the strategic plans. The scope of evaluation is therefore delimited into at the planning/programme design stage. An Evaluation system should be capable of evaluating the performance performance within the whole national strategy (Agenda for Prosperity) as well as the Water Well project in Mambolo; or across logically related programmes, even if components/subcomponents are implemented by, say different wards or chiefdoms in the country.

1.4 Monitoring

Types of and Levels of Monitoring

Process Monitoring
We need to monitor the project to ensure that
1. The financial management function continues to deliver and manage project resources in a way that ensures timely availability of resources, uses proper processes and procedures and meets agreed the standards.
2. The procurement management function employs the appropriate methods, follows laid down and agreed procedures, and maintains due diligence;
3. Inputs (Goods and non-consultant Services, and Consultancy Services) are delivered according to the required quality and on a timely basis.

Progress and Results Monitoring
1. Plans implemented and Outputs delivered on schedule, within budget and up to standard
2. The Results Framework
3. PDO
4. Intermediate Results

1.5 Thought Processes and Actions in the Planning Cycle: Top-Down or Bottom-Up

- Strategic thought - Top-Down
- Planning - Top-Down
- Evaluation - Top-Down, Bottom-Up
- Monitoring - Bottom-Up
- Implementation - Bottom-Up

Monitoring catchwords
   o Activities
   o Results and Outputs
   o Outcomes
   o Impact
   o Targets
   o Indicators
- Assumptions
- Information Processing
- Information collection
- Information dissemination

Evaluation catchwords
- Impact
- Outcomes
- Results
- Inputs
- Targets
- Indicators
- Analysis
- Successes and failures
- Lessons learnt

Implementation catchwords
- Methods
- Approaches
- Alternatives
- Cost-effective
- Innovation
- Change
- Activities
- Inputs

Strategic Thought
- Goal
- Bigger Picture
- Outcomes
- Targets

Planning
- Impact
- Outcomes
- Outputs
- Inputs
- Logical Framework
- Indicators
- Targets
- Verification
- Sources of data
II Why Monitor?

Monitoring
- Provides performance and complementarity information within the projects, across projects, across programmes and sectoral functions, and across stakeholders
- Establishes whether projects are being implemented according to plan, on schedule and within budget, and whether the outputs will be delivered as planned
- Identifies flaws in the design and implementation of projects
- Allows for continuous review of the assumptions underlying the design of a project/programme, and thus facilitates risk assessment and mitigation
- Determines the extent to which project deliverables continue to be supportive of and relevant to the project purpose
- Keeps project managers and implementing partners constantly alert to emerging problems that need attention; ensures flexibility, allowing adjustments to project implementation plans in response to emerging issues; and ensures the timely activation of contingency plans as the situations arise
- Facilitates identification of supplementary projects and interventions required to enhance the effectiveness and sustainability of the outputs from current projects/programmes
- Assists cash flow planning and cash management by council

111 Why Evaluate?

Evaluation generates information that assists management:
- Determine the extent to which the project goals and objectives were achieved, and the extent to which the assumptions and project justification were realistic
- Improve the performance of new and on-going projects and interventions
- Choose among various possible options
- Learn lessons from the implementation of projects and correct for past weaknesses and mistakes, including errors of judgment
- Ensure the sustainability of the deliverables from the project or intervention
- Learn about best practices in a given field
- Make decisions on the identification and implementation of supplementary and complementary and follow-up projects or programmes

Evaluation of the projects of activities of Water sector should normally consist of a minimum of three aspects:
1. Review and quality assurance of a proposed activity or intervention at the design stage;
2. Mid-Term Review undertaken around mid-way during implementation to ascertain that the project/programme is being implemented according to schedule and quality standards, and within budget; and
3. Post-Evaluation and Surveillance, which starts at the end of project implementation and may last a few months or years depending on the type of project or programme. The objective of post evaluation is to ascertain that the project has been delivered on schedule, within budget, and that it meets the requisite quality standards. Determining the latter (quality standards) may require longer-term observation of the performance, use, impact and sustainability of the project outputs over time. This is the essence of surveillance.
What is the Function of the M&E Unit?

The job of the Monitoring and Evaluation (M&E) has two main functions. The first is about knowledge. The second is about follow up action and also to maintain surveillance of the total development environment and the actions and interventions, including inputs, outputs, outcomes and impacts of projects, programmes and interventions throughout the programming cycle of the ministry; to keep policy makers, planners, evaluators and other stakeholders sufficiently informed of developments and progress, including emerging risks and impediments, for them to take informed assessments and decisions. In this sense, it is important to bear in mind that:

- The job of the Monitoring unit is not a Police or specifically to inspect or verify, or undertake technical evaluation or quality assurance of technical projects. He should rely on the judgments and assessments and inputs of specialists
- The above notwithstanding, the M&E unit has a responsibility to ensure and ascertain the reliability of information it reported. In that respect, steps must be taken and efforts made to confirm the veracity of certain reports, especially where it is perceived that, for instance, information received from a particular source is not consistent with the known facts. Such a situation may call for requests for clarification, site visits, requests for reconciliation, second opinion, etc. This is usually the exception rather than the rule in monitoring and evaluation;

- Monitoring: Information collection, processing, analysis and dissemination are shared responsibilities among various actors and institution. The M&E should therefore be clear about the nature of information they need to collect, and from what sources. Similarly users of these guidelines – all stakeholders in monitoring and evaluation should view M&E as a system rather than an individual or a collection of individuals

- Monitoring and evaluation should be a collaborative effort of all stakeholders, with complementary processes in information collection, processing, storage, management and dissemination

- Monitoring indicators and targets are predetermined at the conceptual, planning stages of every project. The Programme officer M&E should focus on these predetermined input, output, outcome and impact indicators and targets throughout project implementation, rather than generate their own indicators;

- Programme officer M&E must not try to create/generate data, but collect the appropriate available information from all possible known sources, process the information and disseminate it to target recipient users, including managers, planners, implementing entities, higher level monitoring and evaluation entities, as appropriate

- Programme officer M&E should avoid attempts at specialized technical monitoring and evaluation of discrete activities – they should bear in mind that they are not the auditor, or stock verifier, or structural engineer

- The Programme officer monitoring and Evaluation should monitor changes, developments and evolutions of events and activities against performance standards in terms of quality, quantity, efficiency and time. These should be based on predetermined indicators, which should remain the focus of monitoring throughout the monitoring and evaluation cycle;

- Monitoring and evaluation should be based on an M&E plan firmly anchored on the Development Plan and designs by the projects, with a clear and constant focus on the performance indicators identified and the targets set during planning; and therefore,
- For the activities of the Ministry to be effectively monitored, all development initiatives of council, including projects, programmes and routine service delivery activities should have indicators identified, baselines established, and targets set in terms of quantity, quality and time to the extent possible. If there are no indicators along with their baselines and targets, monitoring and evaluation will not be feasible and will instead be a futile endeavour.

- The Programme officer M&E should coordinate and convene monthly coordination meetings of the M&E Committee

To assist the M&E teams, actors and institutions effectively and efficiently implement M&E activities of the Ministry, the suggested composition and sample Terms of Reference for the M&E Committee is presented in Section 5.1 below.

5.1 Composition and Terms of Reference for the M&E Committee

**Suggested Composition**
1. The Deputy Director (Chair)
2. Programme officer Monitoring and Evaluation (Co-Chair)
3. The Head of Water Resources
4. SALWACO
5. GVWA
6. One (1) Representative from CTU

**Sample Terms of Reference**

i. Based on Ministry priorities and strategies as articulated during the planning period, agree overall and sector M&E plans and Results Frameworks for Council on an annual basis;

ii. Review relevant documentation and ensure that there is consistency between the overall and sector M&E plans and Results Frameworks with the national and sector development frameworks and strategic documents, including the Agenda for Prosperity the MDG targets, and Sector Programmes and Plans;

iii. Ensure that there is adequate budgetary provision for M&E activities on a year-by-year basis;

iv. Review and endorse indicators and means of verification within the overall and sector-specific logical frameworks;

v. Review progress of implementation of the M&E framework and revise the framework as necessary based on evolving and emerging national and local priorities, plans and strategies

vi. Report on implementation of the M&E framework

vii. Guide the preparation and presentation of M&E reports to the Minister and stakeholders

viii. Encourage, support and coordinate timely and complete reporting and updates by all sectors and stakeholders;

ix. Ensure regular, timely and complete reporting to stakeholders, including line Ministries, and development partners;

x. Solicit technical and other support for implementation of the M&E Framework from the appropriate/competent sources;

xi. Any other M&E work that is assigned and/or delegated to by the Director and Minister

It is recommended that the Committee meets on a regular basis and as frequently as necessary depending on the exigencies of the programming cycle. **At any rate, the Committee should meet at least once a quarter.**
VI The Logical Framework as the Basis for Monitoring and Evaluation

6.1 Basic Principles

1. M&E System and Plans should be aligned to:
   a. The National Policies and Strategies and Targets, including:
      i. The Agenda For Prosperity (A4P)

2. The role of M&E systems should be clear with respect to functions, institutional relationships and reporting responsibilities, including reporting lines

3. There should be clarity regarding the various levels of monitoring, and with respect to the nature of information to be assembled and evaluated, i.e.

4. Process monitoring, input monitoring and output monitoring should be discerned and distinctly delineated from outcome and impact monitoring, yet with logical linkages in terms of results orientation;

5. Regarding information gathering, primary data or secondary data, and how these should be obtained should be clear in the system design and guidelines;

6. The roles of the various institutions, including oversight and guidance, monitoring and evaluation

7. Monitoring responsibilities and Evaluation responsibilities should be clarified – Usually, evaluation should be as independent as possible from the implementation process and the implementers themselves – actors should not be responsible for evaluating themselves unless the intention is one of self assessment.

8. The institutional linkages and relationships, including reporting obligations should be streamlined – the ministry does not report to the other ministry, but should notify and inform it, and share information; the MDA field staff for the respective devolved functions should provide information to the ministry. The Director should promptly pass monitoring and other related information to the M&E Unit for consolidation, processing and appropriate dissemination.

9. There should also a limit to the levels of computational analyses imposed or expected of the M&E officer;

10. M&E should be viewed from a bigger picture perspective – as a system based on institutional cooperation, mutual support and information exchange, rather than a set of parallel structures with competing M&E goals

11. Based on the above, the conceptualization of the institutional relationships and reporting lines and responsibilities with respect to Ministry of Water Resources’ M&E activities.

The major institutions and Actors include:

1. At the Central Government Level:
   MoWR, MEST , MoHs, MLGRD, MoFED, the respective Agencies (SLWACO AND GVWA) and their M&E structure and institutions at central and local levels; and Statistics Sierra Leone

2. At the Local Government Level:
a. The Chief administrator who is pivotal to the whole system, serving as a clearing house for the information management and exchange system both within the councils and between the council and the central government;
b. The Local Council that formulates policies and oversees their implementation based on technical support from the various technical and professional departments under the leadership of the CA. The council consists of specialized committees responsible for sectoral policies issues, planning, budgeting, etc.
c. The various departments within the councils management and administration system, including Finance, development planning, civil works, and the department for devolved functions
d. The M&E Unit headed by the Programme officer M&E whose key role should be the coordination of M&E Activities, and updating the M&E framework, and the collection and consolidation of up to date information on the various M&E indicators in the framework
e. The M&E Committee

For M&E to be effective and serve the developmental needs of both the councils and the country as a whole, all institutions and their respective officials must perform their respective roles in M&E. There is an overarching need for clarity of roles and functions, reporting lines and responsibilities and effective coordination and information flow and exchange.

6.2 The Logical Framework Approach

These Guidelines have used a Logical Framework (logframe) approach to Monitoring and Evaluation. The logframe is useful in the design and planning, implementation, and monitoring projects and programmes because it brings together in one place clear, concise, visible and accessible statements on all the key components of a project/programme, making it easier to report on the implementation of the project and its achievements, highlight any changes, and make adaptations accordingly.

The logframe also makes it easy to understand how the project is going to be implemented, what it is expected to achieve, and helps us to ensure that inputs, activities, outputs and purpose are constantly in clear focus and not confused with each other.

Because a logframe identifies the main factors related to the success or failure of a project/programme, and clarifies how project success will be measured and assessed, it provides a sound basis for monitoring and evaluation.

One of the main functions of Ministry of Water Resources is to take over responsibility is to monitors and provide policies and guidelines to sector players and devolved or delegated them by other organizations/agencies (SALWACO AND GVWC). The agencies retain the residual functions already discussed, including policy determination, standards setting, providing implementation guidelines to the councils, and monitoring the implementation of the devolved functions. As has already been demonstrated, SALWACO and GVWC and design strategies at the national level using the logframe approach.

Similarly, the guidelines provided by MoFED for the preparation of Development Plans and for Budget Preparation are based on a logframe approach. Ministry of Water Resources prepare the plans, including projects and programmes for implementing devolved functions using the logframe approach, notwithstanding the practice still has to be perfected by councils.

Development partners, including the AfDB, UNICEF, World Bank, DFID, EU, INGO/NGO, are also providing development intervention support to Sierra Leone at the sector either directly through
councils or other international organizations. These are also using the logframe approach in their programming cycles for these interventions.

It was therefore only logical to have designed an M&E system that is integrated into the logical framework approach to the planning and programming cycle of Ministry of Water Resources, which is consistent with the approach of both the central government and that of its development partners. That design is therefore what these Guidelines seek to clarify for the users, and guide them on how to use them.

6.3 What is the Logical Framework Approach

The Logical framework defines and represents a hierarchical picture of

1. The overall objectives (goal) of an intervention – a project, programme, etc.
2. The specific objectives which are expected to produced a combined impact leading to the achievement of the overall Goal (in 1) - the results of the various component of a project or programme, or several results deriving from one or more components of the intervention
3. Activities to be undertaken to achieve the specific objective identified in (2)
4. Inputs in the form of financial, human and physical resources and material requirement for the implementation of the various activities indentified in (3);
5. The indicators (including baselines and targets) of progress of implementation of the identified activities and achievement of the objectives of the project or programmes
6. Sources and Means of Verification of the implementation and progress (monitoring reports, independent reports, physical outputs, statistical data on outcomes, etc.)
7. The Assumptions on which the project/programme design is based – political will, implementation capacity, regular resource inflows, stable prices, etc.

Figure 6.2 below is a generic presentation of a logical framework, including an indication of the hierarchy and direction of thought processes, policy formulation, project/programme design, implementation, monitoring and evaluation. As shown in the matrix, strategic thought and policy formulation, the design of interventions (project/programmes), and evaluation are intuitively top-down processes. On the other hand, project and programme implementation (input processing and management) and the monitoring of both progress of implementation and progress towards desired targets are intuitively bottom-up processes.

Figure 6.3 seeks to further clarify the relationships amongst inputs outputs, purpose and goal, respectively in the design of an intervention with inputs (man hours, consultancies, machine hours, etc.) being combined in the implementation process to produce certain outputs (results) aimed at a particular purpose (intervention logic or rational or the specific objectives), which in turn combine to impact the intended goal of the project or programme.
Strategic thinking and planning is a top-down process, with overall goal being the primary focus, and their plans and designs and discrete interventions are conceptualized and articulated – Evaluation should be done along this logic (with the bigger picture – and articulated –)

### Think, Plan, and Evaluate
**Top-Down**

#### Overall objectives
- What is the Overall Objective (or Goal) of this Programme/Project?

#### Specific objective
- What are the overall objectives (or Goal) of this project/intervention expected to make. In short, why do you want to implement this project/programme?

#### Expected results
- What specific objective(s) are the results (outputs) of the project intended to fulfill to contribute to the overall objective (or Goal, or make the desired impact)?

#### Activities
- List all the activities that will be undertaken to produce the expected results identified above.

#### Implement, Monitor Bottom-Up

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### Intervention logic
- What are the expected outputs from the various activities listed above, which will lead to the achievement of the specific objective(s) identified above? Enumerate the expected results.

### Objectively verifiable indicators of achievement
- What are the key indicators related to the overall objectives (or Goal)? This is the highest level of objectives in a programme/project. Note that the Indicator(s) are directly related to the Goal, and should ideally have a quantity, quality, and time dimension and its evolution should be measurable against its baseline and target values; e.g. if the Goal is “to reduce the poverty level in WARDC from 68% in 2011 to 38% by 2015” or “…30 percent between 2011 and 2015”, then the appropriate indicator is the poverty level in WARDC. Which indicators clearly show that the objective of the project/programme will be met, are on tract, or have been met?

### Sources and means of Verification
- What are the sources of information that exist or can be required to get this information?

### Means:
- What are the means required to implement these activities, e.g. personnel, equipment, training, studies, supplies, operational facilities, etc.

### Costs
- What are the action costs? How are they classified? (breakdown in the Budget for the Action)

### Assumptions
- Which factors and conditions outside the Beneficiary’s responsibility (external conditions) are likely to affect the outcomes? Which risks should be taken into consideration? There has to be evidence of a link between outputs and the desired outcomes What external conditions must be met to obtain the expected results on schedule? Stable Prices?... Which policy actions of the Council, for instance will conceptually result in desired reactions of constituents?

### Water Directorate

- Combinations of outcomes normally produce a certain impact – improved nutritional status of mothers and children, lower incidence of malaria, higher standards of sanitation, for instance lead to lower Infant and Maternal Mortality. Non-performance in any of those areas are likely to negatively affect the ultimate impact. Only evaluation and analysis can determine which. It is possible that outcomes in some areas are outside of councils responsibility or control.
The Goal for Bo District Council was to reduce poverty in the Bo District from 65% in 2013 to 45% in 2016. Was it met?

Purpose (The Rationale)

e.g., Has water coverage (rehabilitation and construction) increased in Pujehun District by up to 50% between 2013 (baseline year) and 2016 (target year)?

For instance, water users in Port Loko District increased by at least 20% on average? Do 30% more construction in the District 2014, compared to 2012? Do up to 50% better in the Kenema District use improved inputs in 2014 as compared to 2012?

Identify Indicators and Targets with clarity on quantity, quality and time to ensure it will be clear when PURPOSE is met or the OUTCOMES happened.

Outputs - (The Direct Results – x Km of feeder roads, n bore holes, etc.)

Identify Indicators and Targets with clarity on quantity, quality and timing of RESULTS to determine OUTPUTS have been produced from your activities.

Inputs

(includes activities and resources – human, financial, etc.: seed rice, extension workers, fertilizers, and so on...)

Identify Indicators and Targets with clarity on quantity, quality and time – How do we know the GOAL has been attained or the IMPACT is made.

Identify Indicators and Targets with clarity on quantity, quality and timing of INPUTS (or ACTIVITIES & RESOURCES)
In Figure 6.4 we present the institutionalization and integration of Monitoring and Evaluation into the planning and programming cycle of Ministry of Water Resources from the policy formulation and or legislation stage in council, through the preparation of the council’s development plan and budget through implementation stage. An integrated management system is shown at the heart of the planning and programming cycle. For monitoring and evaluation to be effective and successful, we show M&E as a development tool that facilitates informed decision-making at all levels. We also demonstrate the importance of the M&E system being integrated into the planning and implementation cycle. The M&E officer should be involved *ab initio* right from the policy formulation and project design stage.
Figure 6.4: Integrating the Ministry of Water Resources’ M&E System into the planning and Programming Cycle for Effective Planning, Policy Decision and Project
Building Capacity for Monitoring and Evaluation in Ministry of Water Resources

Ministry of Water Resources in Sierra Leone already have a sound legal, institutional and strategic framework for the effective monitoring and evaluation of the development work and the delivery of services to their constituents. However, we have seen in the current review that their capacities for undertaking effective M&E are relatively weak across all councils in the country. It is imperative for Local Council M&E capacities to be strengthened if they are to effectively implement the functions devolved to them and deliver quality services to the people. In that regard, there is a need for a deeper and conscious focus on the following:

1. Institutionalization of M&E in Ministry of Water Resources
2. Integration of M&E into the Planning Cycle of Ministry of Water Resources
3. Strengthening Ministry of Water Resources Human Resource capacity for M&E through continuous training and adequate staffing
4. Adequate Budgetary Allocation for Monitoring and Evaluation
5. Robust information management and communication strategy
6. Inter-governmental cooperation, collaboration and information exchange
VIII  Monitoring and Evaluation of Local Council Projects and Interventions

Monitoring
A monitoring and evaluation plan should be prepared for each project as soon as the planning process is concluded and the project is included in the council’s Development Plan and Budget. Monitoring of the project should start as soon as actual implementation begins. This is to ensure that resources are well utilized and the plan is implemented according to plan, schedule and budget, with all necessary quality control measures in place. A format for monitoring individual projects is presented Annex III.

Each project should have its own (separate) Monitoring File and Evaluation File opened immediately upon project inception. The M&E Officer will note from the format presented below, that the Monitoring Report requires his/her reliance on the reports and assessments of experts, including engineers, procurement officers, the finance department, etc. for most of the time. The information on the implementation of the project should be collected, compiled and processed using inputs from these specialists as far as possible.

Summary
Here, the Monitoring officer will summarize the status of the project, including his impressions and conclusions on any delays or whether the project is progressing as scheduled, on observed risks, etc. These can be easily discerned from comments and clarifications sought and received from the various specialists, as well as any observations from field/site visits.

Reporting
A set of sample reporting forms for monitoring the implementation of individual projects is provided.

Data Sources Information Flows and Analysis
IX Evaluation (and/or Reviews)

The essence of evaluation is to ascertain whether the project is having the desired impact. In other words it seeks to see if the project is meeting its objectives and whether the benefits are actually reaching the target groups.

Evaluation of projects should be Ex-Post Facto and should be carried out one year after project implementation.

Format for a Project Evaluation Report

I. Project Title: .................................................................

II. Project Code: .................................................................

III. Project Location: ............................................................

IV. Implementation Agency: ..................................................

V. Evaluating Officer: .........................................................

VI. Date of Evaluation ..........................................................

In evaluating the evaluation officer should focus on specific topics and aim at answering specific questions, almost all of which draw from the original project goal, purpose, targets, indicators, etc. The evaluation should not be based on the evaluator’s discretion. Evaluation should focus on the following areas and aspects:

I Objectives (can apply at design quality assurance, mid-term or ex-post evaluation stages)

   i. Have (Are) the project objectives been (likely to be) met?
   ii. Are the objectives still relevant?
   iii. If the answer is no to (ii), please give reasons – which aspects have not been (are not likely to be) met and why, which assumptions broke down, etc.
   iv. State any policies, strategies, or activities which need to be adjusted

II Time and Finance
(For both mid-term and ex-post evaluation)

   i. Was (Is) the project (likely to be) completed on schedule?
   ii. If no to (i) give reasons for delay or time overrun
   iii. Was (Is) the project cost (likely to be) kept within Budget?
   iv. If not state the amount of overruns and the reasons. Reasons may range from cost escalations resulting from disbursement delays or higher than expected inflation, to underestimation during planning and budgeting, etc.
   v. Was (Is) the cash-flow as anticipated?
   vi. If not what were (are) the shortfalls and from what sources
   vii. Was (Is) disbursement timely?
   viii. If no to (vi), explain the extent of delays, from which sources and the underlying factors, which may including delays in compliance with disbursement conditions, communications problems, etc.

III IMPACT - Benefits and Beneficiaries
(This can apply for both mid-term and ex post evaluations)

   a. Are benefits reaching (likely to reach) the target groups? If not, state the intended beneficiaries not being (likely to be) reached
   b. Are benefits reaching (likely to reach) the whole target population? If not, please explain
c. Are (Will) the qualities and quantities of the benefits at (reach) the planned levels? If not explain.

d. Where planned targets are not likely to be achieved, give possible reasons and suggest how the situation may be remedied.

IV Operations and Sustainability (This applies to ex-post evaluation)

i. Is the project operating at the planned level? If not state deficiency(ies).

ii. Are the project assets properly maintained? If not state areas of failure and possible reasons for failure.

ANNEX I

GLOSSARY

KEY TERMS IN MONITORING, EVALUATION AND RESULTS BASED MANAGEMENT

Accountability: Obligation to demonstrate that work has been conducted in compliance with agreed rules and standards or to report fairly and accurately on performance results vis-à-vis mandated roles and/or plans. This may require a careful, even legally defensible, demonstration that the work is consistent with the contract terms.

Note: Accountability in development may refer to the obligations of partners to act according to clearly defined responsibilities, roles and performance expectations, often with respect to the prudent use of resources. For evaluators, it connotes the responsibility to provide accurate, fair and credible monitoring reports and performance assessments. For public sector managers and policy-makers, accountability is to taxpayers/citizens.

Activity: Actions taken or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs.

Related term: development intervention.

Analytical tools: Methods used to process and interpret information during an evaluation.

Appraisal: An overall assessment of the relevance, feasibility and potential sustainability of a development intervention prior to a decision of funding.

Note: In development agencies, banks, etc., the purpose of appraisal is to enable decision-makers to decide whether the activity represents an appropriate use of corporate resources.

Related term: ex-ante evaluation

Assumptions: Hypotheses about factors or risks which could affect the progress or success of a development intervention.

Note: Assumptions can also be understood as hypothesized conditions that bear on the validity of the evaluation itself, e.g., about the characteristics of the population when designing a sampling procedure for a survey. Assumptions are made explicit in theory based evaluations where evaluation tracks systematically the anticipated results chain.
**Audit**: An independent, objective assurance activity designed to add value and improve an organization’s operations. It helps an organization accomplish its objectives by bringing a systematic, disciplined approach to assess and improve the effectiveness of risk management, control and governance processes.

Note: a distinction is made between regularity (financial) auditing, which focuses on compliance with applicable statutes and regulations; and performance auditing, which is concerned with relevance, economy, efficiency and effectiveness. Internal auditing provides an assessment of internal controls undertaken by a unit reporting to management while external auditing is conducted by an independent organization.

**Base-line study**: An analysis describing the situation prior to a development intervention, against which progress can be assessed or comparisons made.

**Benchmark**: Reference point or standard against which performance or achievements can be assessed.

Note: A benchmark refers to the performance that has been achieved in the recent past by other comparable organizations, or what can be reasonably inferred to have been achieved in the circumstances.

**Beneficiaries**: The individuals, groups, or organizations, whether targeted or not, that benefit, directly or indirectly, from the development intervention.

Related terms: reach, target group.

**Cluster evaluation**: An evaluation of a set of related activities, projects and/or programs.

**Conclusions**: Conclusions point out the factors of success and failure of the evaluated intervention, with special attention paid to the intended and unintended results and impacts, and more generally to any other strength or weakness. A conclusion draws on data collection and analyses undertaken, through a transparent chain of arguments.

**Counterfactual**: The situation or condition which, hypothetically, may prevail for individuals, organizations, or groups if there were no development intervention.

**Data Collection Tools**: Methodologies used to identify information sources and collect information during an evaluation.

Note: Examples are informal and formal surveys, direct and participatory observation, community interviews, focus groups, expert opinion, case studies, literature search, etc.

**Development Intervention**: An instrument for partner (donor and non-donor) support aimed to promote development.

Note: Examples are policy advice, projects, programs, etc.

**Development objective**: Intended impact contributing to physical, financial, institutional, social, environmental, or other benefits to a society, community, or group of people via one or more development interventions.

**Economy**: Absence of waste for a given output.
Note: An activity is economical when the costs of the scarce resources used approximate the minimum needed to achieve planned objectives.

**Effect:** Intended or unintended change due directly or indirectly to an intervention.

Related terms: results, outcome.

**Effectiveness:** The extent to which the development intervention’s objectives were achieved, or are expected to be achieved, taking into account their relative importance.

Note: Also used as an aggregate measure of (or judgment about) the merit or worth of an activity, i.e. the extent to which an intervention has attained, or is expected to attain, its major relevant objectives efficiently in a sustainable fashion and with a positive institutional development impact.

Related term: efficacy.

**Efficiency:** A measure of how economically resources/inputs (funds, expertise, time, etc.) are converted to results.

**Evaluability:** Extent to which an activity or a program can be evaluated in a reliable and credible fashion.

Note: Evaluability assessment calls for the early review of a proposed activity in order to ascertain whether its objectives are adequately defined and its results verifiable.

**Evaluation:** The systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results. The aim is to determine the relevance and fulfilment of objectives, development efficiency, effectiveness, impact and sustainability. An evaluation should provide information that is credible and useful, enabling the incorporation of lessons learned into the decision – making process of both recipients and donors. Evaluation also refers to the process of determining the worth or significance of an activity, policy or program - an assessment, as systematic and objective as possible, of a planned, ongoing, or completed development intervention.

Note: Evaluation in some instances involves the definition of appropriate standards, the examination of performance against those standards, an assessment of actual and expected results and the identification of relevant lessons.

Related term: review.

**Ex-ante evaluation:** An evaluation that is performed before implementation of a development intervention.

Related terms: appraisal, quality at entry.

**Ex-post evaluation:** Evaluation of a development intervention after it has been completed.

Note: It may be undertaken directly after or long after completion. The intention is to identify the factors of success or failure, to assess the sustainability of results and impacts, and to draw conclusions that may inform other interventions.
**External evaluation:** The evaluation of a development intervention conducted by entities and/or individuals outside the donor and implementing organizations.

**Feedback:** The transmission of findings generated through the evaluation process to parties for whom it is relevant and useful so as to facilitate learning. This may involve the collection and dissemination of findings, conclusions, recommendations and lessons from experience.

**Finding:** A finding uses evidence from one or more evaluations to allow for a factual statement.

**Formative evaluation:** Evaluation intended to improve performance, most often conducted during the implementation phase of projects or programs.

Note: Formative evaluations may also be conducted for other reasons such as compliance, legal requirements or as part of a larger evaluation initiative.

Related term: process evaluation.

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

Related term: development objective.

**Impacts:** Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended.

**Independent evaluation:** An evaluation carried out by entities and persons free of the control of those responsible for the design and implementation of the development intervention.

Note: The credibility of an evaluation depends in part on how independently it has been carried out. Independence implies freedom from political influence and organizational pressure. It is characterized by full access to information and by full autonomy in carrying out investigations and reporting findings.

**Indicator:** Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect the changes connected to an intervention, or to help assess the performance of a development actor.

**Inputs:** The financial, human, and material resources used for the development intervention.

**Institutional Development Impact:** The extent to which an intervention improves or weakens the ability of a country or region to make more efficient, equitable, and sustainable use of its human, financial, and natural resources, for example through: (a) better definition, stability, transparency, enforceability and predictability of institutional arrangements and/or (b) better alignment of the mission and capacity of an organization with its mandate, which derives from these institutional arrangements. Such impacts can include intended and unintended effects of an action.

**Internal evaluation:** Evaluation of a development intervention conducted by a unit and/or individuals reporting to the management of the donor, partner, or implementing organization.

Related term: self-evaluation.
Lessons learned: Generalizations based on evaluation experiences with projects, programs, or policies that abstract from the specific circumstances to broader situations. Frequently, lessons highlight strengths or weaknesses in preparation, design, and implementation that affect performance, outcome, and impact.

Logical framework (Logframe): Management tool used to improve the design of interventions, most often at the project level. It involves identifying strategic elements (inputs, outputs, outcomes, impact) and their causal relationships, indicators, and the assumptions or risks that may influence success and failure. It thus facilitates planning, execution and evaluation of a development intervention.

Related term: results based management.

Meta-evaluation: The term is used for evaluations designed to aggregate findings from a series of evaluations. It can also be used to denote the evaluation of an evaluation to judge its quality and/or assess the performance of the evaluators.

Mid-term evaluation: Evaluation performed towards the middle of the period of implementation of the intervention.

Related term: formative evaluation

Monitoring: A continuing function that uses systematic collection of data on specified indicators to provide management and the main stakeholders of an ongoing development intervention with indications of the extent of progress and achievement of objectives and progress in the use of allocated funds.

Related term: performance monitoring, indicator.

Outcome: The likely or achieved short-term and medium-term effects of an intervention’s outputs.

Related terms: result, outputs, impacts, effect.

Outputs: The products, capital goods and services which result from a development intervention; may also include changes resulting from the intervention which are relevant to the achievement of outcomes.

Participatory evaluation: Evaluation method in which representatives of agencies and stakeholders (including beneficiaries) work together in designing, carrying out and interpreting an evaluation.

Partners: The individuals and/or organizations that collaborate to achieve mutually agreed upon objectives.

Note: The concept of partnership connotes shared goals, common responsibility for outcomes, distinct accountabilities and reciprocal obligations. Partners may include governments, civil society, non-governmental organizations, universities, professional and business associations, multilateral organizations, private companies, etc.

Performance: The degree to which a development intervention or a development partner operates according to specific criteria/standards/guidelines or achieves results in accordance with stated goals or plans.
**Performance indicator:** A variable that allows the verification of changes in the development intervention or shows results relative to what was planned.

Related terms: performance monitoring, performance measurement.

**Performance measurement:** A system for assessing performance of development interventions against stated goals.

Related terms: performance monitoring, indicator.

**Performance monitoring:** A continuous process of collecting and analyzing data to compare how well a project, program, or policy is being implemented against expected results.

**Process evaluation:** An evaluation of the internal dynamics of implementing organizations, their policy instruments, their service delivery mechanisms, their management practices, and the linkages among these.

Related term: formative evaluation.

**Program evaluation:** Evaluation of a set of interventions, marshalled to attain specific global, regional, country, or sector development objectives.

Note: a development program is a time bound intervention involving multiple activities that may cut across sectors, themes and/or geographic areas.

Related term: Country program/strategy evaluation.

**Project evaluation:** Evaluation of an individual development intervention designed to achieve specific objectives within specified resources and implementation schedules, often within the framework of a broader program.

Note: Cost benefit analysis is a major instrument of project evaluation for projects with measurable benefits. When benefits cannot be quantified, cost effectiveness is a suitable approach.

**Project or program objective:** The intended physical, financial, institutional, social, environmental, or other development results to which a project or program is expected to contribute.

**Purpose:** The publicly stated objectives of the development program or project.

**Quality Assurance:** Quality assurance encompasses any activity that is concerned with assessing and improving the merit or the worth of a development intervention or its compliance with given standards.

Note: examples of quality assurance activities include appraisal, RBM, reviews during implementation, evaluations, etc. Quality assurance may also refer to the assessment of the quality of a portfolio and its development effectiveness.

**Reach:** The beneficiaries and other stakeholders of a development intervention.

Related term: beneficiaries.
**Recommendations:** Proposals aimed at enhancing the effectiveness, quality, or efficiency of a development intervention; at redesigning the objectives; and/or at the reallocation of resources. Recommendations should be linked to conclusions.

**Relevance:** The extent to which the objectives of a development intervention are consistent with beneficiaries’ requirements, country needs, global priorities and partners’ and donors’ policies.

Note: Retrospectively, the question of relevance often becomes a question as to whether the objectives of an intervention or its design are still appropriate given changed circumstances.

**Reliability:** Consistency or dependability of data and evaluation judgements, with reference to the quality of the instruments, procedures and analyses used to collect and interpret evaluation data.

Note: evaluation information is reliable when repeated observations using similar instruments under similar conditions produce similar results.

**Results:** The output, outcome or impact (intended or unintended, positive and/or negative) of a development intervention.

Related terms: outcome, effect, impacts.

**Results Chain:** The causal sequence for a development intervention that stipulates the necessary sequence to achieve desired objectives beginning with inputs, moving through activities and outputs, and culminating in outcomes, impacts, and feedback. In some agencies, reach is part of the results chain.

Related terms: assumptions, results framework.

**Results framework:** The program logic that explains how the development objective is to be achieved, including causal relationships and underlying assumptions.

Related terms: results chain, logical framework.

**Results-Based Management (RBM):** A management strategy focusing on performance and achievement of outputs, outcomes and impacts.

Related term: logical framework.

**Review:** An assessment of the performance of an intervention, periodically or on an ad hoc basis.

Note: Frequently “evaluation” is used for a more comprehensive and/or more in-depth assessment than “review”. Reviews tend to emphasize operational aspects. Sometimes the terms “review” and “evaluation” are used as synonyms.

Related term: evaluation.

**Risk analysis:** An analysis or an assessment of factors (called assumptions in the logframe) affect or are likely to affect the successful achievement of an intervention’s objectives. A detailed examination of the potential unwanted and negative consequences to human life, health, property, or the environment posed by development interventions; a systematic process to provide information
regarding such undesirable consequences; the process of quantification of the probabilities and expected impacts for identified risks.

**Sector program evaluation:** Evaluation of a cluster of development interventions in a sector within one country or across countries, all of which contribute to the achievement of a specific development goal.

Note: a sector includes development activities commonly grouped together for the purpose of public action such as health, education, agriculture, transport etc.

**Self-evaluation:** An evaluation by those who are entrusted with the design and delivery of a development intervention.

**Stakeholders:** Agencies, organisations, groups or individuals who have a direct or indirect interest in the development intervention or its evaluation.

**Summative evaluation:** A study conducted at the end of an intervention (or a phase of that intervention) to determine the extent to which anticipated outcomes were produced. Summative evaluation is intended to provide information about the worth of the program.

Related term: impact evaluation.

**Sustainability:** The continuation of benefits from a development intervention after major development assistance has been completed: the probability of continued long-term benefits; the resilience to risk of the net benefit flows over time.

**Target group:** The specific individuals or organizations for whose benefit the development intervention is undertaken.

**Terms of reference:** Written document presenting the purpose and scope of the evaluation, the methods to be used, the standard against which performance is to be assessed or analyses are to be conducted, the resources and time allocated, and reporting requirements. Two other expressions sometimes used with the same meaning are “scope of work” and “evaluation mandate”.

**Thematic evaluation:** Evaluation of a selection of development interventions, all of which address a specific development priority that cuts across countries, regions, and sectors.

**Triangulation:** The use of three or more theories, sources or types of information, or types of analysis to verify and substantiate an assessment.

Note: by combining multiple data sources, methods, analyses or theories, evaluators seek to overcome the bias that comes from single informants, single methods, single observer or single theory studies.

**Validity:** The extent to which the data collection strategies and instruments measure what they purport to measur