JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Advanced Results-Based Monitoring and Evaluation Training Course

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Advanced Results-Based Monitoring and Evaluation Training Course

Results-Based Monitoring and Evaluation is the subject of this 2-week advanced training course for M&E officers, development portfolio managers and evaluation specialists, who produce a results-based M&E plan with an indicator matrix. Funders and boards now ask whether projects changed lives and services, not merely whether activities happened on time. Jupiter Prime Training offers this course to practitioners who turn that question into evidence decision-makers can use.

Why Results-Based Monitoring and Evaluation Matters Now

Three groups drive demand for stronger evidence: funders who tie disbursement to verified outcomes, beneficiaries and communities who expect a voice in judging change, and executives who must reallocate scarce budgets towards what works. An organisation with a sound results chain, credible indicators and timely learning can scale successful interventions and stop weak ones early; one without them reports outputs, misses unintended effects and loses funding. The course connects these practices to ISO 21502:2020 guidance on project management and its emphasis on benefits, and to the PMBOK Guide 7th edition outcome-focused principles, applied to health, education and infrastructure projects.

Who Gains Most from Results-Based Monitoring and Evaluation

- Specialists who design results frameworks and indicator systems for funded initiatives
- Officers who manage field data collection, quality checks and reporting cycles
- Portfolio managers who use evidence to adjust or close interventions
- Evaluators who design and commission baseline, midline and endline studies
- Learning leads who turn findings into recommendations and management responses

A development agency, foundation or public body gains most when its M&E officer, a portfolio manager and a finance or grants lead attend together and agree one results language.

Results-Based Monitoring and Evaluation Capabilities

Participants trace the path from a theory of change to indicators, data, evaluation findings and the learning that changes decisions.

- Design a theory of change with explicit assumptions and causal pathways — the funder approving the intervention logic
- Build a logical framework linking inputs, outputs, outcomes and impact — the portfolio manager tracking performance
- Specify SMART indicators with baselines, targets and means of verification — the data team collecting evidence
- Apply sampling, survey and qualitative methods suited to context — the field team gathering reliable data
- Weigh experimental, quasi-experimental and theory-based evaluation designs — the commissioning board choosing an approach
- Communicate findings through learning briefs and management responses — the executives deciding to scale or stop

Key Results-Based Monitoring and Evaluation Terms

- Theory of change — a description of how and why an intervention is expected to produce change, setting out causal pathways and assumptions
- Logical framework — a matrix linking objectives at each level with indicators, means of verification and assumptions
- Results chain — the sequence from inputs and activities to outputs, outcomes and long-term impact
- Indicator matrix — a table defining each indicator, its baseline, targets, data source, frequency and responsible person
- Counterfactual — an estimate of what would have happened without the intervention, used to attribute observed change
- Management response — a formal reply to evaluation recommendations stating which will be adopted, by whom and when

Results-Based Monitoring and Evaluation Day by Day

Day 1: The Evidence Landscape

- Monitoring Versus Evaluation Functions — Separating Tracking From Judgement
- Results-Based Management Principles — Shifting Focus From Activities to Change
- ISO 21502 Benefits Orientation — Linking Project Outputs to Organisational Outcomes
- Stakeholder and Funder Evidence Needs — Mapping Who Uses Which Findings
- M&E Readiness Assessment — Judging Current Systems and Capacity Gaps

Day 2: Theory of Change

- Problem Tree and Objective Tree — Clarifying Root Causes and Desired Change
- Causal Pathway Mapping — Drawing Links From Interventions to Outcomes
- Assumption Identification and Testing — Exposing Fragile Links Early
- Contribution and Attribution Thinking — Deciding What Claims Evidence Can Support
- Theory of Change Narrative — Communicating Logic to Funders and Partners

Day 3: Logical Frameworks and Results Chains

- Logical Framework Matrix Construction — Aligning Goal, Purpose, Outputs and Activities
- Vertical and Horizontal Logic Tests — Checking Internal Consistency
- Risk and Assumption Columns — Linking External Conditions to Results
- Results Chain for Multi-Component Portfolios — Aggregating Across Interventions
- Logframe Revision Protocol — Adapting Logic When Context Changes

Day 4: Indicators and Targets

- SMART and SPICED Indicator Criteria — Writing Measurable, Participatory Indicators
- Baseline Establishment — Setting Starting Values Before Implementation
- Target Setting and Milestones — Balancing Ambition With Realism
- Proxy and Composite Indicators — Measuring Hard-to-Observe Change
- Indicator Reference Sheets — Documenting Definitions and Calculation Rules

Day 5: Data Collection Methods

- Sampling Frames and Sample Size — Producing Representative Survey Results
- Household and Facility Survey Design — Structuring Reliable Questionnaires
- Key Informant Interviews and Focus Groups — Capturing Qualitative Insight
- Mobile Data Collection Platforms — Speeding Up Field Reporting
- Ethics, Consent and Data Protection — Safeguarding Respondents and Records

Day 6: Data Quality and Analysis

- Data Quality Assessment Dimensions — Validity, Reliability, Timeliness and Integrity
- Routine Data Verification Visits — Checking Reported Figures at Source
- Descriptive and Disaggregated Analysis — Revealing Differences by Group and Location
- Qualitative Coding and Thematic Analysis — Structuring Narrative Evidence
- Dashboards for Performance Monitoring — Presenting Trends to Managers

Day 7: Evaluation Design

- Evaluation Criteria of Relevance, Effectiveness and Sustainability — Framing Questions
- Experimental and Quasi-Experimental Designs — Estimating Counterfactuals
- Theory-Based and Contribution Analysis — Explaining How Change Happened
- Mixed-Methods Evaluation Matrix — Linking Questions to Methods and Sources
- Terms of Reference for Evaluations — Commissioning Independent Studies

Day 8: Reporting, Learning and Use

- Learning Agendas and Questions — Directing Evidence Towards Decisions
- Learning Briefs and Visual Reports — Making Findings Usable
- Management Response Systems — Tracking Action on Recommendations
- Adaptive Management Reviews — Adjusting Plans Based on Evidence
- Knowledge Sharing With Partners — Spreading Lessons Across Portfolios

Day 9: M&E Systems and Budgets

- M&E Roles and Responsibilities Matrix — Assigning Accountability for Data
- M&E Budget Estimation — Resourcing Data Collection and Evaluations
- Reporting Calendar and Cycles — Aligning With Funder Requirements
- Information System Architecture — Connecting Field Data to Portfolio Reporting
- Capacity Building for Partners — Strengthening Local Data Systems

Day 10: Practising the Results-Based M&E Plan

- Theory of Change Clinic — Applying Day 2 Logic to a Real Initiative
- Logframe and Indicator Build — Applying Days 3 and 4 to the Same Case
- Data and Evaluation Approach Selection — Applying Days 5 to 7 Choices
- Learning and Systems Review — Applying Days 8 and 9 to Implementation
- Results-Based M&E Plan With Indicator Matrix — Completing the Submission

Applying Results-Based Monitoring and Evaluation After the Course

- Review the theory of change of one current initiative with its team, test three key assumptions against field evidence and update the logframe accordingly
- Build indicator reference sheets for five priority outcome indicators and run a data quality check on their latest reported values

Results-Based Monitoring and Evaluation Questions FAQ

What is Results-Based Monitoring and Evaluation and why does it matter now?

Results-Based Monitoring and Evaluation is a way of tracking and judging projects by the change they produce rather than the activities they complete. It matters now because funders link support to verified outcomes and expect evidence of what works.

Which roles gain most from Results-Based Monitoring and Evaluation training?

M&E officers, development portfolio managers and evaluation specialists gain most. They design results frameworks, run data systems and commission studies, so they need sound theories of change, credible indicators and evaluation designs that leaders trust.

How does Results-Based Monitoring and Evaluation differ from a project performance reporting course?

It differs by measuring outcomes and impact rather than schedule and cost progress. A performance reporting course tracks earned value and milestones, while this one tests causal logic, indicators, counterfactuals and learning from evaluation.

What do you bring back from Results-Based Monitoring and Evaluation training?

You bring back a results-based M&E plan with an indicator matrix for a real initiative. It sets out the theory of change, logframe, indicators, data methods, evaluation approach and learning cycle.

Results-Based Monitoring and Evaluation: The Way Forward

The results-based M&E plan with indicator matrix first informs the funder's approval of the intervention logic and reporting commitments. M&E officers run it, portfolio managers read its dashboards, and evaluators build on its baselines. After the first reporting cycle, revisit the assumptions and indicator definitions to see which proved measurable and which need redesign.