



# Plan International's

## External Monitoring and Evaluation

## Technical Strengthening Training

**An accessible training programme for everyone interested in improving the quality of monitoring and evaluation (M&E) initiatives within the development and humanitarian sectors**

**2025**

This course is an adaptation of Plan International's internal M&E Technical Strengthening Training. The training course was developed by Plan International, and it reflects concepts and definitions aligned with the sector and its key stakeholders, including donors. The course was also developed to strengthen critical Monitoring, Evaluation, Research and Learning (MERL) capacities, needs, priorities, as gathered from our offices and partners working across the globe, in humanitarian, development and nexus contexts.

That being said, we acknowledge the vast diversity of organisations, with their distinct MERL needs, priorities, strengths, systems and cultures. For this reason, we kept the content and engagement with the course flexible, relevant to any type of organisation working in humanitarian, development or nexus contexts. We suggest key staff, especially MERL, project/programme managers and those involved in proposal development, to undertake these modules, and make the necessary adaptations, such as translations into local communities' languages. Open and continuous communication with your learning partners, such as their MERL Focal Points, throughout the course and your wider MERL technical strengthening journey will also support you and your organisation adapt the course content and its delivery.

While no module is mandatory, each is aimed to build capacities on fundamental concepts and skills necessary across a range of M&E dimensions, such as drafting M&E frameworks, defining results and indicators, ensuring data quality assurance and so on. Therefore, if time is of the essence, we recommend module prioritisation to be based on your project life course, the scores and discussions following MERL organisational capacity assessment tools (such as [Plan International's MERL/AAP Self-Assessment Tool](#)), and review of the modules' objectives and topics (available in this document, below).

Last but not least, it is worth reminding that training courses, such as this, are not designed nor meant to act as singular solutions to the development of organisations' MERL capacities, cultures, systems and ways of working. As a result, we invite all learners and their organisations to discuss, plan and implement complementary learning opportunities such as applying the learnings into practice, workshops, learning circles, communities of practice, and further and regular quizzes and/or activities. Where relevant and possible, we encourage ongoing coordination with your partners, especially those with stronger MERL cultures, to ensure complementary learning methods of learning are put in place in a collaborative manner.

# What is the training about?

The course contains 7 modules developed and used by Plan International to strengthen the culture, approaches and systems around Monitoring, Evaluation, Research and Learning (MERL). With a specific focus on monitoring and evaluation (M&E), each module aims to provide learners with a comprehensive understanding of these functions, upon which further knowledge and practice can be built. The training covers:

- M&E based on results, especially outputs, outcomes and impact results, in order to enable the tracking and understanding of progress, changes and organisational contributions to improvements in the lives of the people we work with
- Developing SMART (Specific, Measurable, Achievable, Relevant and Time-bound) results and results frameworks
- Identifying, developing and using a variety of indicators
- Developing and aligning M&E Frameworks with project, programmes or strategies
- Ensuring M&E initiatives are planned appropriately, and budgeted for accordingly
- Data quality assurance throughout the M&E process, from conceptualisation to planning, implementation and using the final products
- How can M&E contribute to an organisational culture and practices based on learning and accountability

# Who is the training for?

The training is for **everyone**, no matter their knowledge and expertise of M&E! However, we strongly believe individuals with the following responsibilities will benefit greatly from the training, especially if they are at the beginning/middle of their careers:

- **Staff responsible for Monitoring, Evaluation, Research, Accountability and/or Learning activities.** These could be MERL Managers, MERL officers, MERL focal points, Accountability to Affected Populations (AAP) Specialists, or any other staff member in your organisation with responsibilities related to the MERL and/or AAP functions.
- **Individuals responsible for developing bids or proposals for new projects**, such as Business Development Managers.
- **Managers and Technical Heads**, such as Heads/Directors of Programmes, Project and/or Programme Managers.

# How to access the training?

The course materials are available only in English\* and can be accessed in two (2) ways:

- \* **Via the links provided in the table below, which contains a breakdown of the course, with hyperlinks to the Google Drive of each module.** This is relevant for every type of organisation and learner, but in particular for those who experience often internet issues. The hyperlinks allow learners to download the resources when online, and go through them even in remote areas.
- \* **Via Plan International's Plan Academy learning platform. Instructions on how to join Plan Academy are on the last page of this file.** With its dependence on the internet, the learning platform offers additional features, such as interactive activities, end-of-module quizzes and a certificate once all modules have been completed.

**Please note:** If you would like a **certificate of completion** of the course, this can be gained **only** through the Plan Academy route.

\* Course PowerPoints and related Excel, Word and PDF templates and guidance documents can be downloaded and translated in any language relevant to your context.

# How to cover the content and complete the training?

Once learners and/or their teams or organisations have prioritised which modules they would like to cover, we recommend they download and use the **PowerPoint presentations** (and their respective notes). The **templates and guiding documents** available in the resource packages can provide further support to learners wishing to deepen their understanding of key topics covered throughout the modules. Additionally, the **videos**, which cover the same content as the PowerPoint presentations, are a great resource for learners who prefer to learn via listening.

Facilitators or trainers can download, translate and adapt the PowerPoint files to meet their audiences' needs, and use the speaking notes to add further details to the themes presented.

The PowerPoint presentations, videos and resources (templates/guidance documents) are available on either learning route.

For learners who want to test further their knowledge, the Plan Academy route offers for each module a range of **interactive activities** and a **final quiz**. All of the seven final quizzes must be completed with a "pass" grade in order for you to receive a certificate of completion.

# M&E Technical Strengthening Training

## Programme breakdown and links to module resources

Title	Objectives	Resources
<b>1) Results-based Management (RBM) and the Value of M&amp;E</b>	<p>Describe the important features of Results-Based Management (RBM) and why it is important for projects, programmes, influencing and advocacy work in humanitarian, development and nexus contexts.</p> <p>Define the different elements of the result chain.</p> <p>Explain what a focus on RBM means for an approach to M&amp;E.</p> <p>Understand how a results-based approach can support learning and accountability for your work (whether that is: projects; collections of projects with a common goal, i.e. a programme; influencing and advocacy activities) in your context (whether that is humanitarian, development, or nexus)</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>5</b> PowerPoint Presentations  <b>2</b> Resources (<i>Word, PDF</i>)  <b>5</b> Videos</p>
<b>2) Results and Results Frameworks</b>	<p>Articulate the importance of design processes for good quality M&amp;E.</p> <p>Apply the Problem Tree approach to unpacking problems, causes and effects.</p> <p>Applying the Solution Tree approach as the basis for developing Results.</p> <p>Formulate SMART (Specific, Measurable, Achievable, Relevant, Time-Bound) Results Statements.</p> <p>Know the key steps for developing an intervention logic.</p> <p>Understand what a Logical Framework is. Understand what a Theory of Change is. Know the strengths and weaknesses of the two approaches</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>16</b> PowerPoint Presentations  <b>3</b> Resources (<i>Word</i>)  <b>16</b> Videos</p>
<b>3) Identifying and Defining Indicators</b>	<p>Explain what an indicator is, its purpose, and the various categories of indicators that organisations in the development and humanitarian sector use in programme, influencing, and advocacy work.</p> <p>Explain the 10-step process of identifying and defining indicators.</p> <p>Select and develop appropriate indicators.</p> <p>Assess the quality of indicators.</p> <p>Understand how to calculate and analyse indicators.</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>12</b> PowerPoint Presentations  <b>2</b> Resources (<i>Word</i>)  <b>12</b> Videos</p>
<b>4) M&amp;E Frameworks</b>	<p>Have an understanding of the purpose of an M&amp;E Framework and how it complements an intervention logic.</p> <p>Understand key elements of the 4 components of a comprehensive M&amp;E Framework:</p> <ul style="list-style-type: none"> <li>• Indicator matrix</li> <li>• Data flow</li> <li>• Activity plan and budget</li> <li>• Dissemination strategy</li> </ul> <p>Understand how M&amp;E Frameworks underpin ongoing monitoring and are the basis of evaluations, informed decision making and agile design.</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>14</b> PowerPoint Presentations  <b>8</b> Resources (<i>Word, Excel</i>)  <b>14</b> Videos</p>
<b>5) Planning and Budgeting for MERL</b>	<p>Know why MERL planning and budgeting is important.</p> <p>Be able to describe the steps required to develop a realistic MERL activity plan and budget.</p> <p>Understand what needs to be included in a MERL activity plan.</p> <p>Understand the key cost drivers for MERL initiatives, and what this means for the budgets we develop.</p> <p>Know the considerations for detailed planning and budgeting of individual studies as part of your overall MERL approach.</p> <p>Understand ethical and safeguarding principles and when and how to plan for these</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>19</b> PowerPoint Presentations  <b>10</b> Resources (<i>Word, Excel</i>)  <b>19</b> Videos</p>
<b>6) Data Quality Assurance (DQA)</b>	<p>Describe the principles of Data Quality Assurance (DQA) and why it is important.</p> <p>Understand when DQA needs to be done and the key DQA considerations and techniques at each step of a MERL initiative.</p> <p>Understand and use MERL Quality Assurance templates and checklists to undertake quality assurance and provide feedback.</p> <p>Develop a MERL DQA Plan.</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>15</b> PowerPoint Presentations  <b>4</b> Resources (<i>Word, Excel</i>)  <b>15</b> Videos</p>
<b>7) Learning, Accountability and Use</b>	<p>Understand the key concepts of Learning, Accountability and Use.</p> <p>Be able to contextualise Learning, Accountability and Use in the MERL Process.</p> <p>Understand some useful tools and methodologies for Learning, Accountability and Use.</p>	<p><a href="#">Module general folder</a> (including PowerPoint Presentation for each submodule and the module's resources).</p> <p>It contains:</p> <p><b>10</b> PowerPoint Presentations  <b>5</b> Resources (<i>Word, PDF</i>)  <b>10</b> Videos</p>

# M&E Technical Strengthening Training

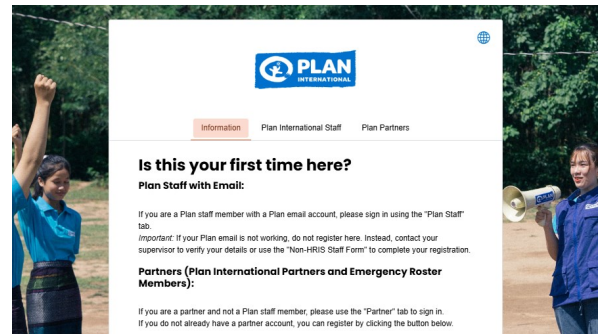
## Plan Academy: Sign up and course access instructions

**Note:** if you **already** have a Plan Academy account, please reach out to your Plan International Focal Point who can reach out to Plan Academy admin who can assign you to the course.

1. Click on the course link [here](#), which will take you to Plan Academy's log-in page

2. On the "Information" tab, read carefully the section for "Partners (Plan International Partners and Emergency Roster Members)".

Don't worry if you are not an official / formal Plan International partner! The same sign up procedures will apply to anyone outside of Plan International.



3. Scroll down to the bottom of the page, and click "Create new account"



4. Fill in your details.

**Very important!** Under the "Partner Details" section, you must include the following email address when asked for the email of your Plan International focal point: **"teodor.balint@plan-international.org"**

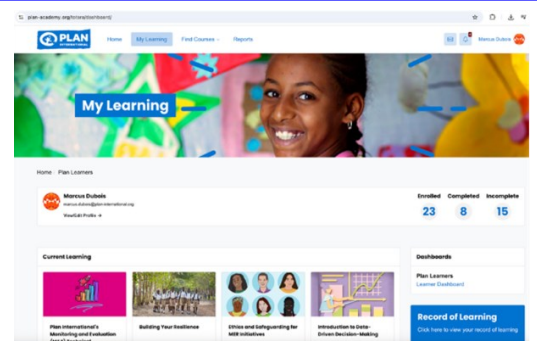
And under the "Name of your Organisation" please type: **M&E Technical**

Without this information, the platform **cannot** verify you **nor** allocate you the appropriate course.

PS: You might need to click on the words "Partner Details" to open up these two fields.

5. Once you have confirmed your email address, you can access the training's Modules, including their PowerPoint files, Video recordings, interactivities, quizzes, resources and the certificate (if needed).

Please note it can take up to 30 minutes for learning to be registered in your account. You can find all your learning assignments in "My Learning", and you can check your completions



If you have any questions about Plan Academy or encounter any sign-up issues, please contact us any time at: [planacademy@plan-international.org](mailto:planacademy@plan-international.org)

### Feedback and contact

If you would like to share your thoughts and feedback on this training programme, please use the MS Forms link [HERE](#) (duration 5 - 7 minutes).