

## Key Competencies for the Monitoring Function

This document sets out the functional competencies (skills, knowledge, attributes and behaviours) needed for effective monitoring. It includes the technical skills required for data collection, analysis and synthesis that are commonly highlighted and also the skills, knowledge, attributes and behaviours needed for the tasks of managing and framing of monitoring systems and *using* monitoring information. These different tasks are often undertaken by different people in organisations. We have identified four sets of roles:

- Data collection, visualisation and management (often done by a monitoring officer, project officer, information officer or enumerator)
- Monitoring and evaluation (M&E) management (often done by an M&E manager)
- Program management (often done by an activity manager or program manager) and
- Organisational management (often done by a CEO or member of the senior management team).

**Depending on the size and nature of the organisation, some of these roles may be carried out by the same person, or multiple people, and may involve community members as well. Some roles – such as data collection and management – may be split across more than one person. An enumerator, for example, may focus on data collection whereas the management of data may be undertaken by a different person.**

In the matrix below we identify some of the key competencies for the monitoring function that correspond to these four roles. To promote usability, this is not a comprehensive listing, but focuses on the key monitoring tasks. This matrix might be used for the following purposes:

1. Map competencies for the monitoring function across an organisation to identify strengths and gaps
2. Inform training and development programs to strengthen monitoring capacity and deepen understanding of the monitoring function
3. Develop job descriptions to assist in recruitment, work planning and staff performance processes
4. Inform local and corporate allocation of resources to ensure adequate support for the monitoring function

| Key Competencies                                  |   |  |  |   |
|---|---|--|--|---|
| Key Tasks   | Data collection, visualisation and management roles   | Monitoring and evaluation management role  | Program management role  | Organisational management role  |
| <b>MANAGE</b>                                     |   |  |  |   |
| <b><i>Understand and engage stakeholders:</i></b> | Interpersonal and cultural competence: ability to make people comfortable, communicate diplomatically, and act with respect. Sensitive to gender and diversity.   | Skills in group facilitation, eliciting, articulating and prioritising information needs<br><br>Persuades others by presenting evidence to support a position. Communicates complex issues clearly and credibly. | Ability to identify and articulate priority information needs with respect to program performance.<br><br>Open to debate and change in light of new information.   | Ability to identify and articulate priority information needs of self and others with respect to the mission of the organisation  |
| <b><i>Integrate systems:</i></b>                  | (For central data management) Adopts a systems perspective, ability to integrate monitoring system with management systems within the organisation and externally with the monitoring systems of other organisations. | Adopts a systems perspective, ability to integrate monitoring system with management systems within the organisation and externally with the monitoring systems of other organisations.                          | Adopts a systems perspective, ability to see and communicate key points of interaction between monitoring systems and management systems within the organisation and externally with other organisations.          | Adopts a systems perspective, ability to see and communicate key points of interaction between systems that comprise and affect the working environment and organisation's goals. |
| <b><i>Determine and secure resources:</i></b>     | Ability to use and manage available resources efficiently   | Ability to identify available and obtainable resources (including staff and equipment within organisation and data sets and resources from partner organisations) to inform design of monitoring system          | Ability to manage local support for monitoring function including resource allocation and budgeting<br><br>Ability to identify existing resources (in terms of data, equipment, staff expertise, and partnerships) | Skills and commitment to manage corporate support for monitoring function including resource allocation   |

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| <b>Define ethical and quality standards:</b>                                  | Ability to practically apply ethical and quality standards for data collection and management | Ability to define and oversee ethical and quality standards for monitoring and data collection and management  | Ability to develop and manage program-wide ethical and quality standards   | Commitment to uphold ethical and quality standards for the organisation   |
|   | <b>Design and document the monitoring system:</b>   | Ability to design fit-for purpose monitoring system to meet priority needs within available resources.<br><br>Curiosity to understand why some things work well or not in different contexts   |  | Ability to develop and inspire commitment to a vision of success and demand evidence to measure progress towards that vision.                 |
| <b>Strengthen monitoring and evaluation capability and culture as needed:</b> |   | Skills and aptitude to plan and manage formal and informal activities to strengthen monitoring capacity at all levels and with partners, including skills in adult education and coaching  | Ability to gain support for monitoring by capitalising on understanding of political forces affecting the organisation.<br><br>Ability to provide clear and consistent formal and informal messages about the value of monitoring                      | Ability to provide clear and consistent formal and informal messages about the value of monitoring  |
| <b>DEFINE what is to be evaluated or monitored</b>                            |   | Ability to develop, assess and continuously refine a program theory and logic based on evidence.<br><br>Ability to integrate gender equality, intersectionality and social inclusion considerations within the logic at appropriate levels | Ability to develop, assess and continuously refine a program theory and logic based on evidence.<br><br>Understanding of how gender equality, intersectionality and social inclusion considerations should be integrated in a program theory or logic. | Commitment to evidence-based programming and associated monitoring including addressing intersectional gender inequality and social inclusion |
| <b>FRAME the boundaries for a monitoring system</b>                           |   | Ability to synthesise primary intended user information, propose realistic boundaries and purpose for a monitoring system and develop monitoring and evaluation questions  | Ability to take decisions on the boundaries and purpose for a monitoring system. including asking monitoring and evaluation questions  |   |

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| <b>COLLECT AND MANAGE data</b>           | Skills in data collection (including digital data capture, context data, qualitative and quantitative data), data retrieval (including use of official statistics and government databases), data disaggregation (along gender and other intersectional lines), skills in local data management (including quality control and security). | Ability to develop an intentional sampling strategy including knowledge and understanding of options for sampling and data collection and management.<br><br>Ability to develop appropriate measures for gender equality, intersectionality and social inclusion   |  |  |
|  | Skills in data management including quality control, data cleaning, security and database design  |  |  |  |
| <b>ANALYSE, INTERPRET AND SYNTHESISE</b> | Ability to identify urgent data that needs to be forwarded more quickly or important data not being captured.   | Understanding of the comparative appropriateness of different methods for the analysis of data to answer descriptive, causal, evaluative, predictive and action questions.<br><br>Ability to facilitate a group to analyse data and reach sound conclusions.<br><br>Ability to select and apply synthesis methodologies. | Ability to make considered decisions based on monitoring information and come to sensible conclusions  | Ability to support staff in reaching honest conclusions based on the evidence.   |
|  | Data analysis skills (qualitative, quantitative), including data visualisation and mapping, appropriate disaggregation, and exploration of outliers, exceptions and patterns<br><br>Knowledge of data analysis software (quantitative and qualitative)  |  |  |  |
| <b>USE AND SUPPORT USE</b>               | Ability to tell clear performance stories (including narratives and/or infographics) drawing on qualitative and quantitative data   | Ability to define issues, generate options, identify opportunities and propose solutions for improving program performance and other uses of monitoring information for decision-making, learning and accountability   | Ability to use monitoring information to inform program and budget decisions to enhance program performance.<br><br>Ability to oversee and ensure program accountability.<br><br>Ability to design learning opportunities for self and sharing learning with others. | Ability to institute organisation- wide mechanisms and processes to promote and support continuous learning and improvement and culture of evidence-based decision-making. |