

[National Maths and Science Learner Support Community of Practice]
Highlights of the Meeting of the Monitoring and Evaluation Colloquium
Lean Thinking and Monitoring and Evaluation
 14 February 2017



Setting the scene

The first Monitoring and Evaluation colloquium of the year was held on the 14 February 2017 and involved a range of CSI practitioners, funders and NGOs. At this meeting, Asgar Bhikoo of Tshikululu Social Investments gave a presentation on lean thinking and its application to monitoring and evaluation.



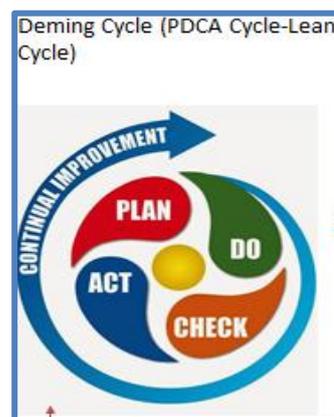
Overview of presentations

Asgar Bhikoo began his presentation by giving a background to the origins of lean thinking. Lean thinking is a business philosophy developed by Toyota Japan post World War II in an effort to compete with other car manufacturers. Most recently, it has been synonymous with software development and social enterprise. The idea behind the lean philosophy is quality improvement through waste reduction.

From a monitoring and evaluation perspective, lean approach to data collection looks at collecting only what is and report back quickly. Lean data collection advocates for a focused approach and is linked to two methodologies, namely developmental evaluation and impact investing.

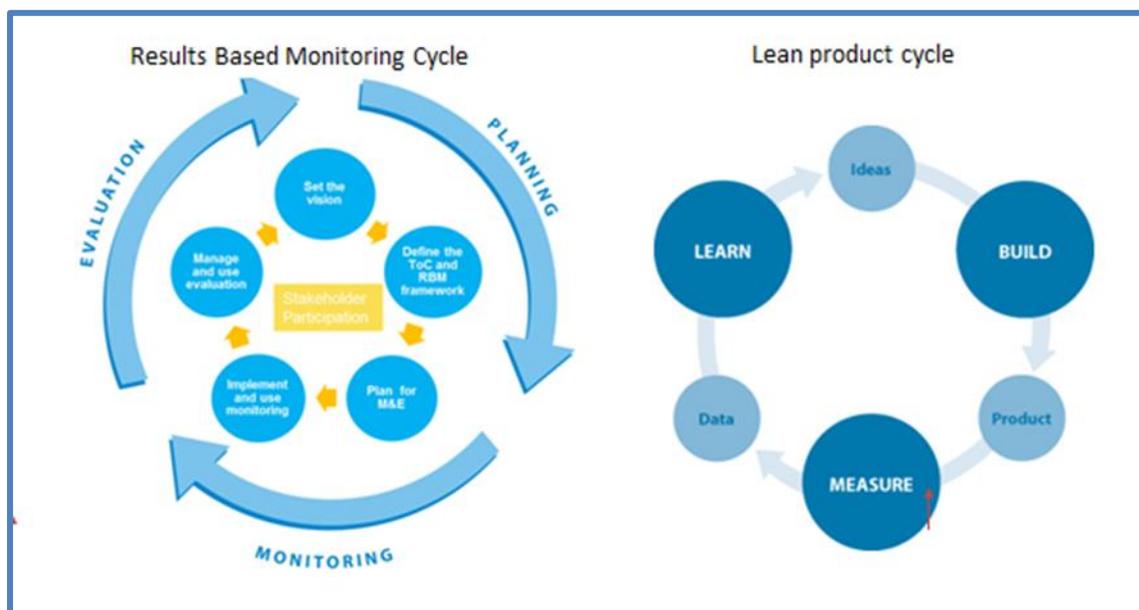
To understand where Lean Thinking may make a difference to organisational operations it is best to understand the cycle that informs lean thinking processes. Bhikoo described the cycles as follows:

- i) Plan Do Check Act (PDCA) is a continuous improvement cycle. This approach allows for continuous improvement based on lessons learned on the job. In an NPO environment, it means paying special



attention to the planning, budgeting and reporting cycles. Often these key cycles give insights into areas of improvement in implementing programmes or projects. Embedded in the implementation cycle is a learning feedback loop that requires learning to inform the next iteration of programme planning.

- ii) The Results Based Monitoring approach bears some resemblance to PDCA. However the timeframe for learning is much longer. The Lean Product Cycle uses the PDCA approach, but encourages learning and innovation as the project is being implemented. This allows for greater adaptation and improvement opportunities. This approach tends to be the way in which lean start-ups or social ventures are moving in terms of developing prototypes that are ready to be tested with the market. Of key importance here is to know when, and how you can continuously improve, and what improvements you are looking for (innovation or process efficiency).



Lean Tools

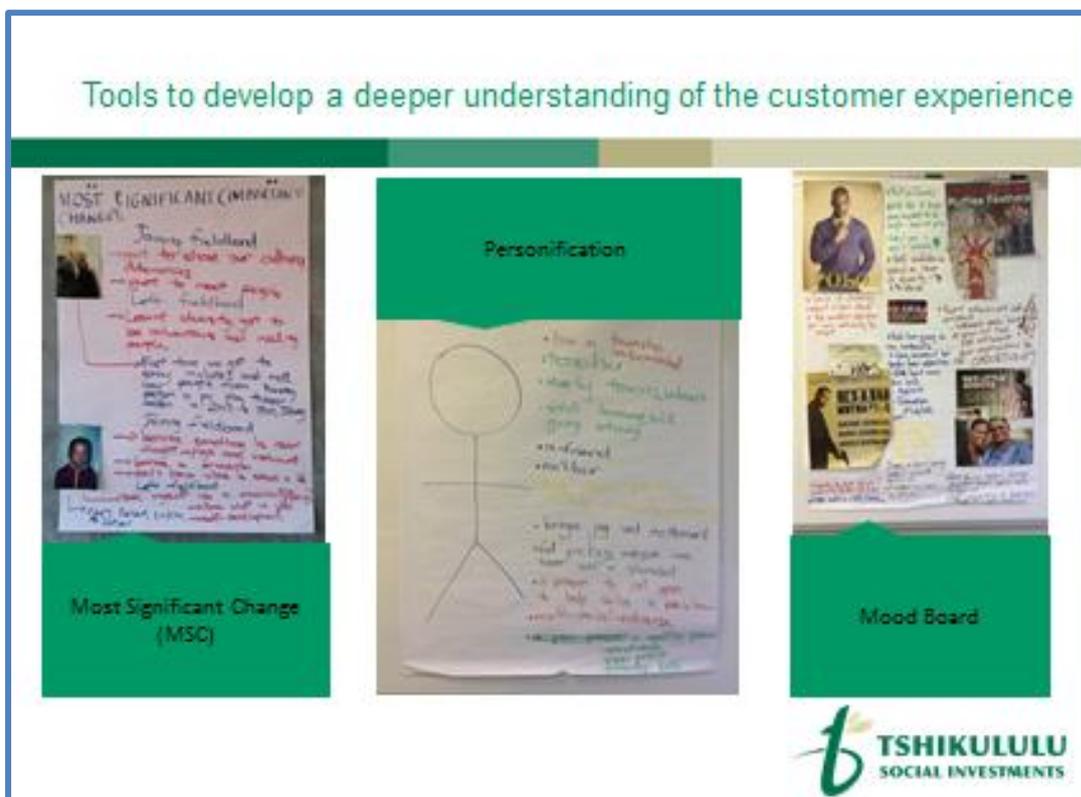
Bhikoo went on to describe a set of tools that can be used to gain greater clarity around areas of improvement, strategy development and making sense of how a programme is integrated within an organisational model. The tools are particularly useful when it comes to developing proposals, designing new programmes, and gathering data on the needs of participants or beneficiaries as well the pathway through which they can be impacted. These tools are primarily used in a business context; however, they share many common traits/factors with planning tools and evaluation methodologies for the development sector. They simplify the planning process, may help with improving efficiency and are useful in understanding what is missing within business plans or proposals. The three tools described were:

- Value Proposition Canvas
- The Business Model Canvas
- Ishikawa Diagram

a) Value Proposition Canvas

This tool is used for understanding who your beneficiaries are, what their mandate is, and what motivates them to achieve their mandate or hinders them from achieving it. It provides a simple framework for understanding where the potential opportunities are in designing an intervention that fits the needs of the beneficiaries. This tool is useful for programme designers as it provides a simplified view of beneficiaries' needs and how they can be best served. The value proposition canvas constitutes three sub-tools:

- i) **Customer journey canvas:** This tool is an expansion of the Value Proposition canvas and provides a deeper understanding of who your customer is. The tool provides insight into the emotions, rational thinking and motivation of customers. It is useful for Programme Implementation Staff and Senior Leadership teams. It is useful when designing a programme, or collecting data to better understand the fit between programme theory and programme delivery.
- ii) **Storyboarding:** Using programme partner storyboards to understand the value proposition. This approach gets programme partners to think about how their approaches might be generic.
- iii) **Tools to develop a deeper understanding of the customer experience:**
 - **Most Significant Change (MSC):** Evaluation method used in focus groups to elicit common understanding of how a programme impacts on the life of a programme participant
 - **Personification:** Research method used to determine perceptions, relations and interactions within an organisation
 - **Mood Board:** Research tool used to gauge the emotions, feelings and aspirations of research participants. It also applies a means of vetting changes identified by MSC.



b) The Business Model Canvas

This is a useful tool for understanding what your intervention/programme is, how it functions, who needs to be involved, what the key cost drivers are and how it can become sustainable. It is also useful for testing innovative ideas for new programme design, or making sense of existing programmes.

The Business Model Canvas also integrates various aspects of monitoring and evaluation that may otherwise be challenging for stakeholders involved in implementing a programme and for those evaluating a programme to understand.

c) Ishikawa Diagram

The Ishikawa diagram is a tool that can be used to identify the root causes of problems. It is often presented in an A3 report format which helps in troubleshooting problems within an organisation. It also provides a useful 1page reporting framework that helps identify, track and measure progress.

To access the presentation, click [here](#).



Discussion

The following section looks at questions raised in response to the presentation as well as Asgar Bhikoo's responses.

When it comes to storyboarding, MSC, moodboard and personification, how do you take information that may be anecdotal and soft and turn it into hard data?

To supplement findings, Tshikululu also collects quantitative data (programme records and surveys). It's important to triangulate data sources to get to a point of consensus as to what the impact has been. Taking a thematic approach is a good way to tackle the mixture of quantitative and qualitative data.

Is it useful to separate the tools into what may be used for monitoring and what may be used for evaluation, and when do you bring in an external evaluator?

The challenge is that impact takes time. When conducting M&E, you need a Theory of Change (TOC) that tells you what the first thing you'll see as impact is, and what you'll see as impact down the line. You need to be conducting M&E at various points of the programme.

- When to bring in an external evaluator depends on the purpose of the external evaluation.
- It makes sense to bring in an external evaluator as a landmark in a programme when you have to make key decisions about the continued funding of a programme.

Are there any other ways to implement lean thinking without using a TOC which some people find difficult?

If you don't want to think along the lines of a TOC, you can get to the crux of the programme by thinking about what the enablers and barriers to impact are. Think about programme implementation from an experimental point of view.



Participants' reflections on the CoP

Towards the end of the meeting, CoP members commented on what challenges they experience with conducting M&E in their organisations.

- ❖ Trying to figure out what to monitor and what data to collect. In the search for corporate funding, what do corporates want to look at?
- ❖ In cases where there are multiple funders funding a single project, each funder has their own expectations which makes M&E confusing when trying to gather and present data for the intended objectives.
- ❖ Scope creep – changes, continuous or uncontrolled growth in a project's scope, at any point after the project commences. This changes what you ought to measure. It derails the project.
- ❖ M&E tools are often dated and there is a lot of resistance in terms of developing and implementing new tools.
- ❖ Lack of M&E skills was also highlighted as a key challenge.

In conclusion, participants called for a central repository of M&E information where results of education evaluations conducted, lessons learnt and M&E tools can be shared.

Attendance register

Name	Organisation	Name	Organisation
Marissa Rollnick	Wits University	Kimon Phitidis	Social Innovations
Naomi Thomas	WSoE	Fia Van Rensburg	fia@developmentworks.co.za
Eugenia Mpfu- Muzenda	Gauteng Provincial Legislature	Bongani Phiri	Freedom of Expression Institute
Angelina Mdakane	Kagiso Trust	Ishmael Mdimia	Habitat for Humanity
Najma Agherdien	Saide	Roshene Singh	PILO
Sizakele Mphatsoe	Kagiso Trust	Susanna Oosthuizen	Penreach
Mpho Ramasodi	JET Education Services	Bailey Nkuna	Penreach
Randy Mremi	Funda Afrika	Anacletta Koloko	Sasol Inzalo
Tanya Nel	ECD Upliftment Projects	Sarah Van Zyl	Ignition - Rays of Hope
Nduvho Ramulongo	Zenex Foundation	Ms Keitumetse Molosiwa	Education Department Northwest
Sydney Mililo	UMLILO Education	Fiona Wallace	Nolwazi OER
Happy Mohlala	Bold Moves 771	Sarah Lubala	BRIDGE
Phathutshedzo Sadiki	GDE	Zarina Khan	Facilitator
Najma Agherdien	Saide	Benter Okelo	BRIDGE
Asiya Hendriks	JET Education Services	Edcent Williams	Independent
Dezi Magwiro	JET Education Services	Sydney Hadebe	IBM
Priscilla Landsman	The Wot-if? Trust	Andries Mangokwana	Private
Louise Henderse	Kerus Institute / UNISA		