





Promoting a Monitoring, Evaluation, and Learning (MEL) Culture among NGO Practitioners in Hong Kong: The Experience of the Jockey Club MEL Institute Project

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Rationale & Objectives



Key challenges in Hong Kong context:

- Despite high performance, most of NGOs lack an organized system and resources to evaluate their programs
- Slow and limited adoption of evidence-based practices among social workers

To overcome these challenges, the Monitoring, Evaluation, and Learning (MEL) Project was developed:

- To develop capacity for a rigorous and comprehensive **program evaluation**
- To intensify the **effect** of social services
- To enhance the **capacity and sustainability** of NGOs









Monitoring:

Focusing on project objectives, implementation plans, and key performance indicators



Evaluation:

Analyzing a project, adopting measurement tactics, and assessing how much the project has accomplished the desired outcomes



• Learning:

Using timely information generated from monitoring and evaluation to further improve a project's implementation, outcomes, and social impacts

Project Framework

- Comprises an interdisciplinary team of trainers and mentors
- Provides tailor-made coaching and mentored practicum
- Includes pitching arrangement and overseas exposure and learning experience

Training and Mentorship

Scheme

MEL

 Develops common and fieldspecific assessment tools, measuring from individual to community levels, augmented by user-friendly practical guides for application to daily work

Outcome/ Impact Indicator Bank

Formative and Summative Evaluation Online Knowledge Hub

- Facilitates easy assess to elearning coursewares and webbased audio-visual learning materials
- Provides an e-forum for online discussion and knowledge exchange

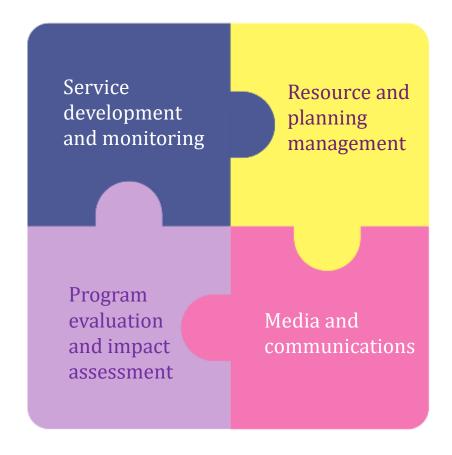
 Uses a mixed-method monitoring and evaluation mechanism

 Disseminates best MEL practices through press and international conferences

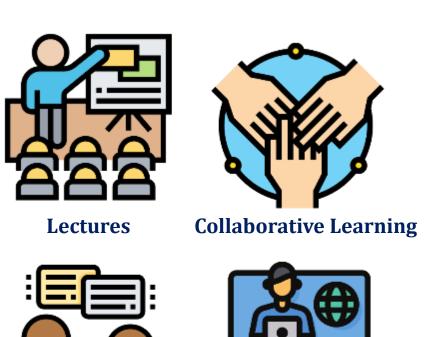
Course Components - Certificated Training Course



Four core areas



Pedagogy



Flipped Classroom

Class Discussion

MEL Trainers - Overseas and Local Experts





Prof. Aron Shlonsky

Department of Social Work, School of Primary and Allied Health Care, Monash University



Prof. Cinzia Canali

International Association for Outcome-Based Evaluation and Research on Family and Children's Services (iaOBERfcs)



Prof. Ilan Katz

Social Policy Research Center, University of New South Wales



Prof. Qijin Cheng

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Prof. Bernard Suen

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Dr. Yuen Hang Ng

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Prof. Minseop Kim

Department of Social Work, The Chinese University of Hong Kong

Sharing Sessions



Sharing Sessions (2020-2021)

Topic: Data Management System & Funder's expectation

Guest Speakers:

- Ms. Rebecca Brosnan (Chief Operating Officer, Mother's Choice)
- Ms. Helene Rao (Deputy Chief Operating Officer, Mother's Choice)
- Mr. Ken Ngai (Chairman of IT Subcommittee, OpenUp.hk Project)
- Ms. Ada Chu (Executive Manager, Charities Planning and Operations, The Hong Kong Jockey Club)
- Mr. Matthew Lee (Senior Manager, ICBC Charitable Foundation)

Sharing Sessions (2019-2020)

Topic: Data Management System & Funder's expectation

Guest Speakers:

- Ms. Rebecca Brosnan (Chief Operating Officer, Mother's Choice)
- Mr. Raymond Fung (Senior Social Work Supervisor, Caritas Youth and Community Service)
- Mr. Bryan Wong (Head of Charities (Grant Making), The Hong Kong Jockey Club)
- Ms. Ada Chu (Executive Manager, Charities Planning and Operations, The Hong Kong Jockey Club)
- Mr. Matthew Lee (Senior Manager, ICBC Charitable Foundation)
- Mr. Timothy Ma (Vice-Chairman (External) Hong Kong General Chamber of Social Enterprises Limited)



Output

2020-2021 cohort

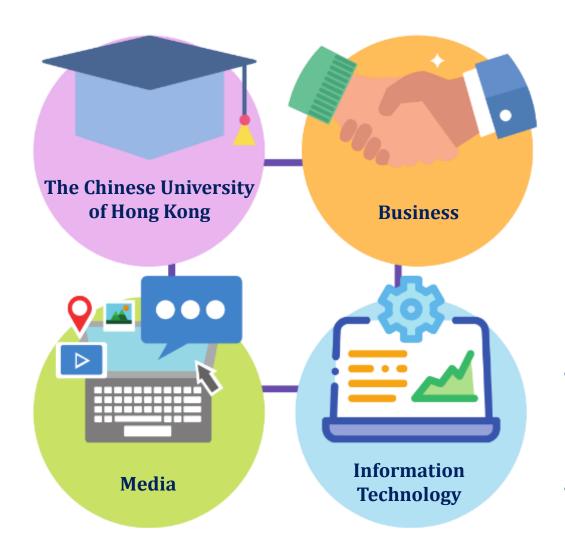
- Number of participants: 126
- Number of training course held: 14 sessions
- Number of sharing sessions held: 2 sessions
- Mode of training: Online via Zoom

2019-2020 cohort

- Number of participants: 122
- Number of training course held: 14 sessions
- Number of sharing sessions held: 2 sessions
- Mode of training: Face-to-face

Course Components - Mentored Practicum

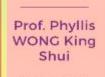






- Mentors will coach participants to conduct a four-month Mentored Practicum by putting MEL knowledge and skills into practice within participants' NGOs
- Achieve change at service and/or organizational levels

MEL Mentors



Assistant Professor Department of Social Work, CUI K



Department of Social Work, CUILK

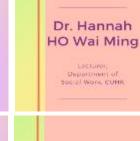


Assistant Professor Department. of Social Work, CURK











Dr. Yuk Yan

SO

Social Work, CUHR.





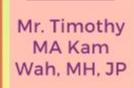




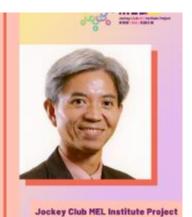








Council member. Hong Kong General Chamber of Social Enterprises Limited



2020-2021



Director & Innovation Consultant, Education for Good









Output

Nov 2019 – Mar 2020

Nov 2020 – Apr 2021 No. of Meetings: 4 (per group)

Venue:

Zoom or Face-toface Total No. of hours:

8 hours (per group)



Composition of mentor group

- No. of teams per group: 2
- No. of participants per group: 6 to
 10
- No. of mentors per group: 2
 - ✓ One CUHK mentor
 - ✓ One mentor from business, media, or information technology fields

Final Project Pitching





Winners will be sponsored to showcase their good practices at international conferences



Five teams will receive Outstanding Award each year



Online Knowledge Hub





MEL Online Knowledge Hub: <u>jcmel.swk.cuhk.edu.hk</u>





Resource and Planning Management

Blockchain for data management



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Service Development and Monitoring

Linking performance measurement, monitoring and programme evaluation

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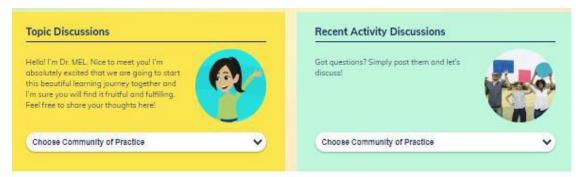


Online courses & web-based audiovisual learning materials

Outcome/ impact indicator bank



Online community of practices



















Winning Team 2019-2020

cial Garden Project: The effectiveness of lying Horticultural therapy for SEN studer

ing Fong (Hong Kong Character City Movement Ltd)
Lai Fong (Hong Kong Society for the Protection of Children)
wok Wai (Evangel Children's Home)
ang Chi (Heep Hong Society)

Best Practices Sharing (2019-2020)











Best Practices Sharing (2020-2021)

Impacts



Local and overseas interdisciplinary experts from universities and

institutions: 23

Final Project Pitching Day: 2 (60 teams)

Course sessions^a: 170+

Training hours: **400**+

250+ Participants

3,000+ NGO practitioners joining sharing sessions organised by MEL participants

1,400,000+ Unique visitors of MEL website

- Mixed-method monitoring and evaluation
- Academic articles: 2
- Press conference: 1
- International conference: 1

(580+ attendees)

Training and Mentorship Scheme

Outcome/ **Impact** Indicator Bank

Field-specific assessment tools

Developed scales: 300+

Total downloads: 90,000+

Unique visitors of Outcome/ Impact Indicator Bank: 36,000+

Hub

- Users of web-based audio-visual learning materials: 130,000+
- Posts of Online Community of Practice (OCOP): **14,000+**
- Active members of OCOP: 3,200+
- Live broadcast sharing sessions: 8

Research Design for Major Components

Quantitative Approach

- Changes in attitudes, knowledge and skills, and behaviors
- Training and mentorship scheme
 participants: participants (experimental
 group) and their non-participating
 colleagues (comparison group)
- Online knowledge hub users: pre-survey (before watching e-learning videos) and post-survey (after watching the videos)

Qualitative Approach

- Case studies and focus group interviews
- Sample interview questions:
 - ✓ Do you have any changes in mindsets after finishing our 14 training sessions? If yes, how?
 - ✓ How do you benefit from the mentored practicum?

Measurement on MEL participants

Dimensions	Details
Knowledge and Skills (17-item)	 Definition: one's understanding of MEL, awareness of program evaluation tools and methods, and skills in disseminating program results Sample Items: Having an understanding of MEL Using digital storytelling techniques in sharing evidence-based practice
Attitude(3-item)	 Definition: one's appreciation of MEL, positive mindset towards MEL, and confidence in applying MEL knowledge and skills Sample Items: Being confident in applying MEL Cultivating a MEL mindset
Behavior(3-item)	 Definition: one's application of MEL best practices in service planning, monitoring, and evaluation, as well as proactively sharing MEL knowledge with colleagues and engagement in MEL community of practice Sample Items: Sharing MEL knowledge with colleagues Applying MEL knowledge and best practices in one's organization

Measurement on users of MEL Online Knowledge Hub

Dimensions	Details
Knowledge and Skills (1-item)	OKH-KS: Having improved knowledge of the MEL model and good practice guideline
Attitude(2-item)	 OKH-ATT1: More willing to apply MEL in your services OKH-ATT2: Greater awareness of available MEL research tools and technological resources in the project's online knowledge hub
Behavior(2-item)	 OKH-BEH1: Having applied the knowledge and skills learnt in the project's online knowledge hub to your services OKH-BEH2: Engaging in MEL peer learning and community of practice

Data analysis of the Training Effectiveness

Data:

Cohort 2019-2020 Cohort 2020-2021 Multivariate analysis of covariance (MANCOVA)

Screening:

- * Only those with pre-training and post-training data
- * Cohort 2019-2020: 114 participants in the experimental group and 103 participants in the comparison group
- * Cohort 2020-2021: 112 participants in the experimental group and 110 participants in the comparison group

Duefile of posticipents

Profile of participants					
Characteristic	(2019-2020)	2019-2020) (2020-2021) Profile of participants			
	n=122, %	n=126, %	Characteristic	(2019-2020)	(2020-2021)
Gender				n=122, %	n=126, %
Male	37.7	40.5	Work Area (multiple choices)		
Female	62.3	59.5	Children	29.8	23.0
Educational Level			Community	29.8	31.0
Sub-degree or diploma	1.6	2.4	Education	21.5	14.3
Undergraduate	27.9	31.7	Elderly	21.5	33.3
Master's degree	66.4	65.1	Ethnic minority	6.6	6.3
Doctoral degree	4.1	0.8	Family	22.3	22.2
Years of Working Experience			Labor	5.0	2.4
Less than 1 year	0.0	3.3	Medical/nursing	14.0	9.5
1-2 years	9.4	7.4	Offender/addict	4.1	1.6
3-4 years	12.8	13.9	Rehabilitation	19.8	27.0
5 years or above	77.8	75.4	Youth	30.6	23.8
•			Welfare/social security	20.7	15.9
Job Position	26.1	44.4	Others	4.1	32.5
Social worker	36.1	44.4	Characteristic	Mean(SD)	Mean(SD)
Health care professional	2.5	3.2		` ,	` ,
Manager/ administrator	41.8	29.4	Age(years)	39.7(8.6)	38.1(8.4)
Social entrepreneur	3.3	3.2			
Therapist	1.6	4.0			22
Others	14.7	15.8			

Overall Outcomes

Outoons Indicators	Percentages(%)			
Outcome Indicators	Cohort 2019-2020	Cohort 2020-2021		
Training and Mentorship Scheme				
Overall, participants showed an improvement after the MEL training and mentorship scheme	83.2	90.2		
Participants showed an improved understanding of MEL	81.4	86.6		
Participants cultivated a MEL mind-set in planning, monitoring, and evaluating their services	93.0	95.5		
Participants demonstrated the application of MEL knowledge and best practices	91.2	94.6		
Participants demonstrated engagement with MEL peer learning and community of practice	84.2	87.5		
Participants proactively shared MEL knowledge gained with colleagues	81.6	90.2		
Participants would recommend the training and mentorship scheme to their colleagues	85.1	92.9		
Online Knowledge Hub				
Users were more willing to apply MEL in their services	91.2	92.0		
Users had greater awareness about available MEL research tools and technological resources in the hub	91.2	94.6		
Users had improved knowledge of the MEL model and good practice guideline	87.7	88.4		

Effectiveness Test for Training and Mentorship Scheme

Cohort	Dependent v	variables	Comparison group (N=103/110)		Experimental group (N=114/112)		F	Sig.	Partial Eta
	-		Mean	SD	Mean	SD			Squared
	Knowledge	Pre	2.708	0.651	2.540	0.609	13.924	***	0.062
	and skills	Post	2.828	0.788	3.108	0.537	15.924		0.062
2019-2020	Attitude	Pre	2.213	0.994	2.564	0.893	44.672	***	0.176
2019-2020		Post	2.677	1.046	3.491	0.580	44.072		
	Behavior	Pre	2.100	0.983	2.398	0.989	25 207	***	0.144
		Post	2.621	1.036	3.298	0.632	35.207		0.144
	Knowledge	Pre	2.474	0.759	2.452	0.626	10.703	**	0.048
	and skills	Post	3.028	0.835	3.305	0.676	10.705		0.048
2020-2021	Attitude	Pre	1.973	1.020	2.286	0.946	39.210	***	0.156
2020-2021		Post	2.736	1.078	3.500	0.774	39.210		0.130
	Behavior	Pre	1.888	0.959	2.188	1.056	19 760	***	0.091
		Post	2.727	1.110	3.280	0.778	18.769	ጥጥ	0.081

Note. *p<0.05, **p<0.01, ***p<0.001. Sample size in italic was for cohort 2020-2021.

Paired Sample T-Test for the Online Knowledge Hub

Courses for Public (Animations)		Cohort Pre-		test	Post-test		95% Post-pre	Sig
			M	SD	M	SD	difference	
1	Media and Communications 1: Web-based social technologies for social service organizations	2019-2020 2020-2021	63.137 60.755	10.536 23.722	99.500 99.802	1.818 1.780	(34.441, 38.285) (34.903, 43.191)	***
2	Media and Communications 2: Effective project management with the latest media tools	2019-2020 2020-2021	- 61.010	- 21.373	- 85.745	- 16.899	- (20.322, 29.147)	- ***
3	Program Evaluation and Impact Assessment 1: Measurement tools	2019-2020 2020-2021	65.455 55.556	14.833 28.572	99.048 97.732	2.541 10.696	(30.859, 36.327) (37.151, 47.202)	***
4	Program Evaluation and Impact Assessment 2: Statistics in program evaluation (part 1)	2019-2020 2020-2021	- 36.458	- 20.861	- 77.872	- 7.784	(37.448, 45.380)	- ***
5	Program Evaluation and Impact Assessment 3: Statistics in program evaluation (part 2)	2019-2020 2020-2021	- 49.684	- 22.466	- 97.234	- 11.758	- (43.579, 51.520)	- ***
6	Resource and Planning Management 1: Ethics in program evaluation	2019-2020 2020-2021	75.862 62.500	15.786 23.690	96.444 97.624	5.988 8.499	(17.841, 23.324) (30.953, 39.294)	***
7	Resource and Planning Management 2: Blockchain for data management	2019-2020 2020-2021	- 57.905	- 26.524	- 93.861	- 12.327	(31.234, 40.680)	- ***
8	Service Development and Monitoring 1: MEL models and their applications in social services	2019-2020 2020-2021	55.882 52.556	23.912 22.132	97.568 97.760	8.214 6.363	(37.339, 46.031) (41.370, 49.039)	***
9	Service Development and Monitoring 2: Linking performance measurement, monitoring and program evaluation	2019-2020 2020-2021	- 34.579	- 21.101	- 60.588	- 19.993	- (20.936, 31.081)	- ***

Note. *p<0.05, **p<0.01, ***p<0.001.

Paired Sample T-Test for the Online Knowledge Hub

Web-based Audio Visual Learning Materials (Scenario-based videos)		Cohort	Pre-test		Post-test		95% Post-pre	Sig
	Learning Materials (Scenario-Dased Mideos)		M	SD	M	SD	difference	
1	Media and Communications 1: Developing a creative communication strategy	2019-2020 2020-2021	61.081 60.784	10.398 26.281	98.788 98.400	2.524 7.871	(35.659, 39.754) (33.088, 42.143)	***
2	Media and Communications 2: Content marketing strategy for social services	2019-2020 2020-2021	- 63.030	- 23.781	- 84.167	- 12.879	- (16.822, 25.451)	- ***
3	Program Evaluation and Impact Assessment 1: 'Don't Know' responses in a scale	2019-2020 2020-2021	55.263 46.392	12.605 21.548	100.000 97.053	0.000 13.138	(42.449, 47.025) (46.407, 54.915)	***
4	Program Evaluation and Impact Assessment 2: Fundamental topics in questionnaire design	2019-2020 2020-2021	61.861 56.566	12.970 23.872	100.000 97.083	0.000 11.021	(35.785, 40.494) (36.298, 44.737)	***
5	Program Evaluation and Impact Assessment 3: Statistics in program evaluation(part 3)	2019-2020 2020-2021	- 46.809	- 21.549	- 97.391	- 9.539	- (46.905, 54.261)	- ***
6	Program Evaluation and Impact Assessment 4: Statistics in program evaluation (part 4)	2019-2020 2020-2021	- 39.362	- 20.152	- 97.419	- 10.190	- (54.429, 61.687)	- ***
7	Resource and Planning Management 1: Ethical research involving children	2019-2020 2020-2021	75.439 64.000	14.266 24.710	97.826 98.800	3.887 4.248	(19.760, 25.015) (30.455, 39.145)	***
8	Resource and Planning Management 2: How to develop a data management system	2019-2020 2020-2021	- 57.255	- 25.680	- 95.000	- 12.744	(32.460, 43.031)	- ***
9	Service Development and Monitoring 1: Accountability and program evaluation	2019-2020 2020-2021	44.500 43.211	13.270 14.871	99.000 98.116	3.108 6.464	(52.101, 56.899) (51.927, 57.883)	***
10	Service Development and Monitoring 2: Types of program data and their application in program evaluation	2019-2020 2020-2021	- 54.200	- 18.119	- 98.586	- 6.326	- (40.969, 47.802)	- ***
	Overall	2019-2020 2020-2021	62.053 52.769	6.931 11.704	98.686 93.170	1.629 5.507	(35.498, 37.768) (38.396, 42.407)	***

Note. *p<0.05, **p<0.01, ***p<0.001.

Qualitative Findings



Systematic MEL knowledge and skills

"I found the concepts of logic model and theory of change very useful. The course is very comprehensive and provides us with a big picture of how we should use these concepts step-by-step."



Mindset change on program evaluation

"As for changes in my mindset, I realized that it is not enough for us to have good projects but without anyone knowing how good it is."



Application of MEL

"We have used some measurement scales to measure the effectiveness of our projects. And our organization has also been using the BACK model and logic model for program evaluation."

Qualitative Findings

Advanced communication tools

"One of the advantages of MEL training is that the teachers have introduced many useful tools for better project management."

Understanding of funders' expectations

"Our [MEL] training scheme has a sharing part about how to convince funders to approve our project proposals. I think this is very clear and help us better meet funders' expectations when we prepare grant proposals."

Online Knowledge Hub: rich resources on evaluation

"When I went through the pages of the MEL website and watched the clips of best practices, I found it is a good idea to put all data in one website and we can access it easily."

A platform for social networking

"One surprising benefit I gained from this program is social networking development. I actually paid visits to some organizations and initiated some collaboration."

Smoothening the process of application

"Mentors have guided us through the process of program evaluation. I think the mentors have smoothened the process of transforming theories into practical use for us."

"The final project has given me a chance to put MEL knowledge and skills into practice"."

Success Factors



RESPONDING TO THE ACTUAL NEEDS

Accountability; NGOs faced barriers to MEL adoption



INTERDISCIPLINARY TEAM OF EXPERIENCED TRAINERS AND MENTORS

Local experts in the business, media, information technology, and social work fields; overseas experts



INTEGRATING MEL KNOWLEDGE AND SKILLS WITH PRACTICE

A four-month mentored practicum; alumni sharing sessions, alumni live broadcast and Final Project Pitching



PROVIDING TIMELY AND COMPREHENSIVE SUPPORT TO PARTICIPANTS

Chatbox function; alumni sharing sessions and alumni live broadcast; WhatsApp groups



MULTIDIMENSIONAL CORE COMPONENTS

Training and mentoring scheme, online knowledge hub and online outcome/indicator bank



LEVERAGING INFORMATION COMMUNICATION TECHNOLOGIES

Zoom (Chatbox function, breakout rooms); online knowledge hub



KEEPING CLOSE COMMUNICATION WITH TRAINERS AND MENTORS

Advice on the course contents, briefing sessions; polling feature to engage participants, breakout room function; WhatsApp groups



COMPREHENSIVE PROGRAM PLANNING AND FREQUENT DEBRIEFING

A detailed plan with the direction, objectives and expected results of the project; regular team meeting and debriefings

Future Development

Existing challenges (based on a training needs survey and focus groups interviews with participants):

- Implementation challenge: Heavy workload on conducting evaluation, lack of dedicated staff for MEL, resources/expertise limitation, lack of infrastructure for data monitoring
- Difficulty in data analysis and interpretation: Adoption of statistical methods in evaluation, employment of social media in outcome dissemination
- A huge gap between the number of beneficiaries of the MEL project (over 200) and that of social workers in Hong Kong(26,663)(Social Workers Registration Board, 2022)

These challenges call on a second phase of MEL Project:

- A strengthened training and intensified mentorship scheme in responding to the existing challenges of NGO practitioners
- A sustainable community of practice and peer learning environment for cultivating a MEL culture and mindset among NGO practitioners
- A user-friendly e-learning knowledge hub for performance measurement development, MEL knowledge exchanging, and dissemination of good practices

Future Development



Strengthened Training & Mentorship

- Intensive six-month training and mentorship scheme
- Provides additional training on MEL organizational practice, dissemination, and MEL practical tools (e.g. managing organisational challenges & effective outcome dissemination)
- Reduces size of mentor group (8→4) to intensify guidance to help participants transfer MEL knowledge to organizational practice



Community of Practice(CoP)

- Quarterly organizes CoP webinars and invites MEL experts and experienced NGO practitioners /leaders to share MEL inspirations and good practices
- Provides an e-forum for online discussion and knowledge exchange



Online Knowledge Hub

- Provides new publicly accessible elearning courseware and web-based audio visual materials on "assessment of organizational contexts for MEL", "infrastructure and talent development for MEL", and "data interpretation and report writing"
- Further develops 200 common and field-specific assessment tools augmented by user-friendly practical guides

