### Summary

A very practical exercise involving a field visit to allow participants to explore how they can use Sphere for monitoring and/or evaluating a projects.



### Aim

This module aims to provide participants with practical experience monitoring and/or evaluating a project using the Sphere Standards so they can better implement Sphere in their daily work and increase their project performance.

### Learning objectives

*By the end of this session, participants will be able to:*

* Illustrate how to use the Sphere rights-based approach and the Core Humanitarian Standard (which replaces Sphere Core Standards’ Chapter) together with the technical chapters
* Identify the opportunities and challenges of using Sphere in practice
* Create useful recommendations for improving project performance
* Demonstrate practical experience in using Sphere for project monitoring and/or evaluation.

### Key messages

* Sphere offers key tools for monitoring and evaluating projects.
* The implementation of Sphere’s technical tools should be carried out in conjunction with the Sphere rights-based approach throughout the project implementation: always review the Humanitarian Charter, the Protection Principles, the Core Humanitarian Standard (CHS) and the cross-cutting themes together with any technical chapter, and consider the other technical chapters.
* Minimum standards are universal, but key actions and key indicators must be selected and, where appropriate, adapted to the context. Guidance notes provide advice on how to do this appropriately.
* If your project is unable to meet the Sphere standards, you should report why, describe the potential negative consequences, and mitigate them, as well as advocate to fill the gaps.

#### Preparation & resources

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| For the facilitator | For each participant | For each group of 3-5 participants |
| * This exercise requires time and preparation well in advance of the training. Use for that purpose Handout ‘The Sphere field school: Preparation’ * Prepare a project brief as a reference for this exercise. Use Handout ‘The Sphere field school: Project brief’ * Cut the Handout ‘Instructions for participants’ into sections and place them in envelopes for distribution at different moments throughout the field visit | * Sphere Handbook, highlighter * Notebook and pen * Handout ‘Instructions for participants’ | * Flip chart stand, paper and marker pens (various colours) * Post-it notes, small size, tabs style |

### You may also want to look at:

* **Modules A1-A2-A3** – What is Sphere? (You should complete some of these modules beforehand)
* **Module A14-A17** – Sphere and the technical chapters
* **Module B1 & B2** – Sphere and the project cycle

### To know more:

* **See** the video ‘Humanitarian Standards in Context – Bringing the Sphere Handbook to Life’: [www.sphereproject.org/resources](http://www.sphereproject.org/resources)

#### Session plan

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| Activity | Description | Timing |
| Introduction | Participants will experience how using Sphere for monitoring and/or evaluating a project can improve its performance. | 5' |
| Field school  Instructions | Explain the exercise: you are going to visit a project and monitor/evaluate if it is achieving a specific standard.  Distribute the briefing note to everyone (template and example in the handout).  Using a flip chart, explain the rules for this exercise to the participants.  Split participants into 4 groups (max) of 3 to 5 participants each, and balance in terms of gender, ethnicity and experience as appropriate. | 10' |
| Field school  Preparation at training venue | The assignment is: ‘**Monitor and/or evaluate if the project is achieving the minimum standard X**’.  Guide participants through the preparation. Tell them that this stage is as important as the field visit. They should:   * Read/view/listen to information about the project * Select the relevant indicators they wish to specifically examine for their assigned standard(s), and review the associated key actions and guidance notes * Prepare a list of questions and data needed for their assigned standard(s) * Review other standards or principles which should be examined to complement their assigned standard(s), such as the CHS, humanitarian principles, Protection Principles, cross-cutting themes or minimum standards from other technical chapters * Organise their teams with clear roles and responsibilities, i.e. who will run interviews, who will take notes, etc.   Let the groups meet for 10’ to coordinate amongst themselves and look at the CHS Commitment 6 on coordination. | 30' |
| Field school  Project visit | Participants go to the project site and conduct the visit.  The project site manager or staff gives a briefing on the project and resources (10’) and is available to respond to questions (10’) and introduce the participants to the community representative. (20’ in total)  The teams start working on the site and collect data. (1 hour)  As a facilitator be on standby; be available to respond to queries and ensure that the rules, including security, are respected. If there is a problem, any team – including the project visit – may be suspended.  At the end of data collection, all should return to the training venue. | 80' |
| Field school  Return and data processing | The teams process the data collected and consolidate the information. They prepare presentations assessing to what level the standards were achieved. They should suggest recommendations for improvement. | 20' |
| Debriefing | Each team presents its findings in plenary. (4 groups x 5’)  Brainstorm in plenary on opportunities and challenges linked to this exercise.  Ask, while doing this exercise:   * How have you considered the Humanitarian Charter, the Protection Principles, the CHS, the cross-cutting themes and all the technical chapters? * How did you coordinate with the other teams?   Ask participants how they feel and what they would do differently next time. | 30' |
| Wrap-up | Review this module’s key messages in plenary. Ask participants to comment on the exercise they performed. | 5' |

### Tips for facilitators

* Advance preparation is crucial for this module and may take a lot of time. Make sure you can manage to do it (see handout).
* Your role as a facilitator for this session is key: take it very seriously, including any security issues (see handout).
* You should gear this session towards participants who already have basic knowledge of Sphere. Otherwise, mixing the field visit with an introduction to Sphere can be too much at once.
* Carefully choose the minimum standard(s) to be monitored/evaluated.
* Time can easily become an issue for this module: when estimating how long it will take, make sure to include time for transportation to and from the project site. However you could also allow for more time to conduct this field school.
* The community hosting the field visit should be prepared well in advance, in order not to raise expectations. It is important to explain to the community that the exercise is not an assessment, but rather a monitoring and/or evaluation training exercise, in order not to raise expectations in an inappropriate way.
* It is important to use a site where the agencies involved have had an open relationship with the community and have left room for mutual feedback during the project, otherwise participants may encounter many frustrated perspectives and the community may feel offended they were selected for an exercise when they had never the opportunity to speak up.
* This field school exercise is one of the most powerful tools to demonstrate how much Sphere can contribute to improving project performance. Enjoy it together with the participants!