Monitoring and Evaluation: A guide to getting started

Social sector organisations in India are committed to doing great work on ground. Many work closely with their intended beneficiaries engaging with multiple stakeholders- coordinating with the communities they work with the government, and other partner organisations all the while ensuring that they do not drop the ball on administrative and funding activities. Juggling these activities is not only daunting but also becomes more challenging for a fledgling organisation with limited staff. To an organisation which is already short-staffed and struggling to do good work while staying afloat, the idea of monitoring projects or evaluating them after completion can become the straw that breaks the camel's back if not approached correctly.

Trends show the growing prominence of monitoring and evaluation (M&E) activities in improving projects, planning projects better, increasing impact and objectively measuring the impact that a project has had. A survey of 35 respondents from organizations responsible for over USD100 billion of global development expenditure revealed that the most important purposes of monitoring are for project improvement (91 percent of the respondents), and accountability to funders (87 percent respondents). With regard to evaluation, 85 percent of respondents stated that learning lessons was a key motivation for evaluation, followed by 82 percent that indicated that evaluations helped improve development impact[1]. Given the importance of M&E, it would merit organisations to start making it part of their organisational DNA.

Today, there are many frameworks by which an organisation can design its M&E activities— conceptual frameworks (such as the theory of change), results-based frameworks, or logical frameworks. The question many small NGOs have, however, is how they can accommodate M&E into their workings without it becoming an additional burden. Are there ways in which they can do effective M&E without spending additional resources (both money and manpower) on it? While M&E processes and frameworks may seem complex and time-consuming, it is possible to get started on the process.

Here are some points that would help organisations get started on the M&E pathway[2]:

1. **Incorporate M&E at the very beginning:** At the very beginning of the project planning itself, monitoring and evaluation must be incorporated into the project design so that a robust system is in place to measure the success of the intervention. Designing an M&E plan at the initial project planning stage itself would also help towards building a clear picture of the intended outcomes of the project in a measurable manner.
2. **Ask the right questions:** While planning the M&E, the questions must be directed towards building an assessment process which sufficiently measures the key aspects of the project. This would also help avoid overburdening your staff with collecting information which is unnecessary or irrelevant to the M&E of the specific project. For instance, in a project focusing on adult literacy, the waste management system of the school would not need to be assessed.
3. **Identify project aims, objectives, outcomes and intended impact:** While designing the project, identify the aims, objectives, outcomes and impact in a SMART manner, i.e. they

[1] Monitoring and Evaluation in the Development Sector: A KPMG International Development Assistance Services (IDAS) practice survey (2014)

[2] Sources referred:
- https://blog.socialcops.com/academy/resources/create-an-effective-monitoring-and-evaluation-framework/
- https://gsdrc.org/document-library/ten-steps-to-a-results-based-monitoring-and-evaluation-system/
- https://www.thecompassforsbc.org/how-to-guides/how-develop-monitoring-and-evaluation-plan

should be specific, measurable, attainable, relevant and time-bound. This will ensure that the M&E process can be focused and directed towards measuring the outcomes and impacts, and ensuring that the project aims and objectives are geared in the correct direction.

4. **Identify the right indicators, monitoring intervals and framework:** The monitoring process needs to identify the right indicators and monitoring intervals for a project. The monitoring interval for a project where a physical asset is being monitored would have longer time intervals (eg. monthly or annual assessments) versus person-centric projects (like an education project, for example) would require more frequent monitoring intervals.

5. **Provide sufficient training to staff:** The staff carrying out the M&E process at the organization should be trained and sensitized to understand why monitoring and evaluating a project is of critical importance. It must been seen as not only a procedural necessity but as an opportunity to ensure that the project successfully attains its intended objectives and to better plan future projects.

6. **Utilize the data gathered effectively:** The M&E exercise should not be conducted as an end in itself. It is important that the data gathered be reviewed and used to inform further project planning. Lack of sufficient response on the M&E would make it another bureaucratic process and reduce the motivation for staff to engage in the exercise effectively.

Another aspect to consider is to bring on-board external support systems in designing and conducting M&E. This could be both in terms of technology and human resources. Technological tools include GIS tools, online data collection software, mobile data collection, and other similar ICT tools. Technological tools make the process faster, documentation easier and the data collection more accurate. They allow for cost reduction and increased accuracy by collecting data electronically, making it less resource intensive, getting richer data and providing better insights (maps, data visualizations, dashboards, etc.)[3]. Human resources dedicated to the M&E process would ensure a dedicated team is in place to conduct the evaluation as well as ensuring the independence of the evaluation process. This can be in the form of project staff who is entrusted with conducting the M&E activities for the project, an independent team that conducts all monitoring and evaluation activities for all organisations, or outside organisations or institutions to conduct third party evaluations.

It is evident that beginning to conduct M&E might initially seem to be an additional task which would be time and resource consuming. However, getting started on the path using a process-oriented approach, supporting tools and resources, and a plan to effectively utilise the results of the monitoring and evaluation should help in kick-starting the process.

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[3] https://blog.socialcops.com/academy/resources/technology-monitoring-and-evaluation/