**M&E BASICS**

**What is Monitoring and Evaluation in Projects**

Around the world, there are Projects being implemented and each of them have goals and objectives to achieve. To ensure that Projects are implemented effectively and efficiently, there is need to ensure that Monitoring and Evaluation AKA M&E takes place. In this article we are going to discuss what M&E is, Why M&E is important, how it is implemented and examples of M&E in projects.

**What is Monitoring and Evaluation?**

According to the book entitled [**‘Basic Principles of Monitoring and Evaluation’**](http://ilo.org/wcmsp5/groups/public/---ed_emp/documents/publication/wcms_546505.pdf) published by the International Labor Organisation (ILO) M&E is defined as a processes that allows policymakers and programme managers to assess: how an intervention evolves over time (monitoring); how effectively a programme was implemented and whether there are gaps between the planned and achieved results (evaluation); and whether the changes in well-being are due to the programme and to the programme alone (impact evaluation).

While M&E may be seen as one word, it is actually comprised of two words. The first word is **Monitoring** and the second word is **Evaluation**. Lets gets a deeper understanding of these two be looking at some examples of monitoring and evaluation in projects.

**(A) Monitoring**

Monitoring is a continuous process that is done through out the Project cycle. This activity involves tracking activities and checking whether the planned activities are achieving their targets. If the targets are not achieved, then corrective action is instituted to bring the project back on course.

**Example**

A project that has planned to train 60 members of the community in the first quarter of 2023 fails to achieve its target but instead only trains 30 members of the community. As an M&E officer, you discover that only 30 members of the community were trained. Since this falls short of the planned target, you ask the following questions:

Why did we fail to achieve our target?

What can be done to bring the project back on course?

What support is need?

By asking these questions, you immediately make recommendations to management on the corrective action that must be implemented. It is then up to management to follow suit.

**(B) Evaluation**

Since we have discussed what monitoring is, let us begin to discuss what Evaluation is. By definition, evaluation is an indepth assessment that is conducted to determine whether a Project achieved its overall goals or not. There are basically three types of evaluations namely:

**i.**[**Baseline**](https://monitoring-and-evaluation.com/what-is-a-baseline-survey/)**:** This is an activity conducted before the project commences or right at the beginning of the project. The Baseline is a research that determines the situation that prevailed right before the Project commenced. This activity is important for 2 important reasons (i) to establish a benchmark for setting of targets and (ii) to establish a benchmark for determining the before and after situation.

**ii. Mid-Term Evaluation:**A mid-term evaluation is done midway through project implementation to determine what has been achieved so far. This activity is important because it provides an early warning for management to determine what should be done to bring the project back on track. To understand this better look at the example below:

**Example**

A five (5) year project that begun in 2020 conducted a project mid term evaluation in 30 months later to determine what had been achieved so far. It was discovered that the project had fallen short in 8 of its key targets. To remedy the situation, the evaluator provided to the Project Management Team, recommendations on how to resolve the challenges.

In this example, the project management team were provided ample time to correct their mistakes before the project comes to an end in 2025 because of being given advance warning.

**iii. Endline Evaluation**

The endline evaluation is conducted at the end of the Project implementation. This is the most important evaluation because it determines whether the Project has achieved its overall goals or not. The endline evaluation aims to determine the project effectiveness, efficiency, impact, sustainability and relevance.

Upon completion of the evaluation exercise, the evaluator who conducted this assessment will communicate the findings to the Project Management Team. It is then up to the Project Management Team to accept the recommendations provided by the consultant and use these recommendation in the design of the next Project.

**Why is M&E important?**

M&E is by far among the most important activities that must be conducted in every project around the world. Remember, this activity can be conducted in any project around the world whether in health, construction, agriculture or marine. However, the question you are obviously asking is, why is M&E important. In this section, we are going to discuss the importance of M&E in Projects.

**(i) Improved effectiveness**: In recent times, there has been increasing concern on why results are not meaningful. With the implementation of M&E, this tool can be used to improve effectiveness through taking corrective action when results are not meaningful.

**(ii) Improved efficiency:** Most projects around the world are increasingly experiencing rise in costs due to inflation and other economic factors. M&E is used to improve efficiency by maximizing output with the limited resources available.

**(iii) Improved Resource Mobilisation**: Most donors are more willing to work with institutions that have strong and reliable M&E systems available. To guarantee you are able to maximise on donor funds, you must build your M&E systems.

**(iv) Improved design of new Programmes:**Upon completion of a Project, an endline evaluation is conducted to determine whether the Project achieved its intended results. The recommendations provided after the evaluation will feed into the development and implementation of a new project.

The whole monitoring and evaluation cycle aims to stimulate continuous learning and improvement. When this is achieved then there will be improved implementation of Projects around the world.

**How is M&E implemented?**

Monitoring and Evaluation is implemented at certain stages in the Project Cycle. Keep in mind that monitoring takes place throughout the Project cycle while Evaluation takes place at certain points in time. However, both activities have similar steps in the implementation of M&E activities. Below is the step by step process of implementing M&E in projects.

**Step 1: Desk Review**

A desk review is conducted by reading all relevant documentation related to the Project. The aim of this stage is to understand the Project and identify all the relevant indicators. Remember, indicators can be impact level indicators, outcome level indicators or output level indicators. It is key to isolate all these indicators because these are the variables you will utilize when doing your data collection.

**Step 2: Develop Data Collection Tools**

Data collection tools are instruments that are required to facilitate for data gathering in the field. Without data collection tools in place, it will be challenging to know whether the project is achieving its targets or not. When developing data collection tools, the first and most important thing to do is first identify all the indicators present and develop the tools aligned to the specific indicators.

**Step 3: Undertake Data Collection**

Upon completion of developing your data collection tools, the tools should be used to undertake data collection in field. If you are collecting primary data, then the most appropriate way is to conduct one on one interviews with beneficiaries. If you are collecting secondary data, this will involve using gathering relevant data from information already published by third parties. It is always important to remember, when using third party information, in your M&E report always ensure you reference where the data was obtained.

**Step 4: Undertake Data Entry, Data Cleaning and Data Analysis**

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Upon collection of data, the next stage is to enter the data into a computer software. The most common computer software’s used are Microsoft excel, SPSS or STATA. It is best to use a software you are most familiar with in order to ensure that data entry is conducted with ease.

Once all the entries have been done, the next stage is to conduct what is known as data cleaning. According to the website called Tableau, Data Cleaning is the process of fixing or removing incorrect, corrupted, incorrectly formatted, duplicate, or incomplete data within a dataset [(source: Tableau 2023)](https://www.tableau.com/learn/articles/what-is-data-cleaning). This is another important phase of step 4 because if you have incorrect data in your data set, the chances are very high of analysing incorrect data leading to the communication of misleading information to stakeholders. The data cleaning exercise usually shouldn’t take more than 48 hours depending on the size and resources allocated to this task.

The final phase of stage 4 is to conduct Data Analysis. [Data Analysis](https://ori.hhs.gov/education/products/n_illinois_u/datamanagement/datopic.html) is the process of systematically applying statistical and/or logical techniques to describe and illustrate, condense and recap, and evaluate data. According to Shamoo and Resnik (2003) various analytic procedures “provide a way of drawing inductive inferences from data and distinguishing the signal (the phenomenon of interest) from the noise (statistical fluctuations) present in the data. Data analysis is another important activity designed to bring out the information. It is this information that informs decision making by the Senior Management.

Analysis helps answer important questions such as:

1. Where did we go wrong?
2. Did we achieve our planned targets?
3. What were the challenges?
4. What can we do to achieve our targets?

These are but a few of the questions that a robust analysis can answer leading to better decision making by Management.

**Step 5: Undertake Report Writing**

A report is an important means to communicate findings to stakeholders. This mode of communication ensures that the findings are well documented for future reference. In writing a report , there are a few important tips that must be followed to ensure proper communication of results.

**Tips on proper report writing**

**Tip 1:**Use the recommended reporting format

The recommended reporting format is as follows:

1. **Cover Page**
2. **Executive Summary**
3. **Table of Contents**
4. **Introduction**
5. **Objectives**
6. **Methodology**
7. **Findings**
8. **Discussion**
9. **Conclusion**
10. **Recommendation**

**Tip 2:**Communicate findings based on the indicators

When writing a report, it is very important to communicate findings based on the indicators of the Project. The report must clearly demonstrate the current status of the indicators and whether the planned targets were achieved or not. If possible, the report must explain why the planned targets failed to be achieved.

**Tip 3:**Concise conclusion and recommendations

The conclusion of the report must explain whether the Project is making progress or not in concise terms. Further, based on the conclusions, recommendations must be formulated which addresses the weaknesses identified in the implementation of the Project.

**Tip 4:**Use images, charts and graphs

To keep the reader engaged in the report, it helps to employ different formats that help in the communication of findings. The most notable are the use of images, charts and graphs. Images are a powerful way to explain to readers what is really happening in the field regarding the implementation of the project. Charts and graphs help summarize the findings to assist readers better grasp the findings without any form of difficulties.

**Step 6:**Submission of a Report + Recommendations to Management and revision

When the report is compiled and finalised, it is then submitted to management for review. The Management Team are at liberty to provide their feedback and raise queries were need arises. However, in cases where Management disputes the findings, there is need to revisit the data sets or if possible, the actual data collection tools used in the data collection process. If it is established that the findings in question are indeed authentic, then there is absolutely no need to change any findings even in cases where management raises a dispute on the report.

If it is established that the queries raised by the Management Team are indeed warranted, then the Report must be revised accordingly.

**Step 7:**Corrective Action

Once management has finally accepted the report, then it is up to the team to take corrective action based on the recommendations made. The implementation of the corrective action will ensure that the Project continues to register improvements.

Capacity Building in Monitoring and Evaluation for FREE

Capacity building in M&E is essential for effective delivery of projects. Here at the M&E academy of excellence we recognise that accessing CPD trainings can prove really difficult especially because of the limited funds that may be available by prospective students. You will be pleased to know that here on this website you can access some trainings for completely free. That is not all though, you can actually get a CPD Certificate upon completion of the course.

Upon completion of the training, make sure to request for your certificate. All the very best!!

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**The Importance of Project Monitoring and Evaluation.**

Project monitoring and evaluation (M&E) is a crucial aspect of project management, as it provides a framework for gathering and analyzing data on the progress and impact of the project. Here are some of the importance of M&E and the various benefits it can bring.

1. *One of the key benefits of M&E is that it helps to ensure that the project is meeting its goals and objectives. By regularly collecting and analyzing data on the progress of the project, project managers can identify areas of success and areas that may need improvement. This can help to ensure that the project is on track to meet its goals and objectives and can make adjustments as needed.*
2. *Another benefit of M&E is that it helps to identify the impact of the project on the intended beneficiaries. By evaluating the long-term effects of the project, project managers can understand the broader and lasting impact of the project and can inform future project planning.*
3. *M&E can also help to build support and ownership for the project. By involving stakeholders in the M&E process and sharing the findings with them, project managers can demonstrate that the project is responsive to the needs and priorities of the intended beneficiaries. This can help to build support and ownership for the project, which can be critical to its success.*
4. *M&E can also help to foster innovation and creativity. By continuously learning and seeking ways to improve, individuals and organizations can be more open to new ideas and approaches, which can lead to the development of innovative solutions to complex problems.*
5. *Another benefit of M&E is that it can improve the quality of the project. By regularly collecting and analyzing data on the progress of the project, project managers can identify areas of success and areas that may need improvement. This can help to ensure that the project is of high quality and meets the needs and expectations of the intended beneficiaries.*
6. *M&E can also help to increase accountability and transparency. By being transparent about the methods and sources of data and sharing the findings of the M&E process with stakeholders, project managers can demonstrate that the project is meeting the needs and expectations of the intended beneficiaries and is being managed effectively. This can help to build trust and credibility, which can be critical to the success of the project.*
7. *M&E can also help to inform decision-making. By providing a comprehensive understanding of the progress and impact of the project, M&E can provide the data and insights needed to make informed decisions about the direction and focus of the project. This can help to ensure that the project is aligned with the goals and objectives of the organization and is making the most of its resources.*
8. *Finally, M&E can help to foster a culture of learning and continuous improvement. By regularly collecting and analyzing data on the progress and impact of the project, individuals and organizations can be more open to new ideas and approaches and can be more proactive in seeking ways to improve. This can help to drive innovation and creativity and can lead to the development of better solutions to complex problems.*

There are however also several challenges to M&E, including the need for resources and the need for reliable and accurate data that Program Managers need to be cognizant of. It is important to be aware of these challenges and to put systems in place to address them and or mitigate these challenges.