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**AFRICAN INSTITUTE FOR PROJECT MANAGEMENT STUDIES**

**Course: Post Graduate Course in Grants Management**

**Course Module: Module 5**

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Module Five

1. ***Monitoring and evaluation are always portrayed as being one and the same thing, yet that are different.” Discuss the truthfulness of this statement.***

**What is monitoring;**

**Monitoring** is the systematic and routine collection of information from projects and programmes for four main purposes: To learn from experiences to improve practices and activities in the future; To have internal and external accountability of the resources used and the results obtained; To take informed decisions on the future of the initiative; and to promote empowerment of beneficiaries of the initiative.

**What is Evaluation;**

Evaluation is assessing, as systematically and objectively as possible, a completed project or programme (or a phase of an ongoing project or programme that has been completed). Evaluations appraise data and information that inform strategic decisions, thus improving the project or programme in the future. Evaluations should help to draw conclusions about five main aspects of the intervention: Relevance; effectiveness; efficiency; impact; and sustainability.

**Comparison;**

Monitoring is integral to evaluation. During an evaluation, information from previous monitoring processes is used to understand the ways in which the project or programme developed and stimulated change.

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| **Monitoring** | **Evaluation** |
| Monitoring is the systematic and routine collection of information about the programs/projects activities | Evaluation is the periodic assessment of the programs/projects activities |
| It is ongoing process which is done to see if things/activities are going on track or not i.e. it regularly tracks the program | It is done on a periodic basis to measure the success against the objective i.e. it is an in-depth assessment of the program |
| Monitoring is to be done starting from the initial stage of the projects | Evaluation is to be done after certain point of time of the project, usually at the mid of the project, completion of the project or while moving from one stage to another stage of the projects/programs |
| Monitoring is done usually by the internal members of the team | Evaluation is done mainly done by the external members. However, sometimes it may be also done by  internal members of the team or by both internal and external members in a combined way |
| Monitoring provides information about the current status and thus helps to take immediate remedial actions, if necessary | Evaluation provides recommendations, information for long term planning and lessons for organizational growth and success |
| It focuses on input, activities and output | It focuses on outcomes, impacts and overall goal |
| Monitoring process includes regular meetings, interview, monthly and quarterly reviews etc. Usually quantitative data. | Evaluation process includes intense data collection, both qualitative and quantitative |
| It has multiple points of data collection | Data collection is done at intervals only |
| It gives answer about the present scenario of the project towards achieving planned results considering the human resources, budget, materials, activities and outputs | It assesses the relevance, impact, sustainability, effectiveness and efficiency of the projects |
| Monitoring studies the present information and experiences of the project | Evaluation studies the past experience of the project performance |
| Monitoring checks whether the project did what it said it would do | Evaluation checks whether what the project did had the impact that it intended |
| Helps to improve project design and functioning of current project | Helps to improve project design of future projects |
| Monitoring looks at detail of activities | Evaluation does not look at detail of activities but rather looks at a bigger picture |

1. ***Discuss the effects of Monitoring and Evaluation in project management.***

**Projects are monitored so as to:** • assess the stakeholders’ understanding of the project; • minimise the risk of project failure; • promote systematic and professional management; and • assess progress in implementation.

**Evaluation has several purposes, which include the following:** • It assists to determine the degree of achievement of the objectives. • It determines and identifies the problems associated with programme planning and implementation. • It generates data that allows for cumulative learning which, in turn, contributes to better designed programmes, improved management and a better assessment of their impact. The key words in this scenario are “lessons learned”. • It assists in the reformulation of objectives, policies, and strategies in projects / programmes.

1. ***What are the advantages of conducting Monitoring and Evaluation?***

**Monitoring and evaluation is important because:**

* It provides the only consolidated source of information showcasing project progress;
* It allows actors to learn from each other’s experiences, building on expertise and knowledge;
* It often generates (written) reports that contribute to transparency and accountability, and allows for lessons to be shared more easily;
* It reveals mistakes and offers paths for learning and improvements;
* It provides a basis for questioning and testing assumptions;
* It provides a means for agencies seeking to learn from their experiences and to incorporate them into policy and practice;
* It provides a way to assess the crucial link between implementers and beneficiaries on the ground and decision-makers;
* It adds to the retention and development of institutional memory;
* It provides a more robust basis for raising funds and influencing policy.

1. Outline in details the guidelines to an effective project evaluation

**Summary of the evaluation process**

**Preparatory phase (phase 0)**

A manager is appointed to conduct the evaluation. He sets up the reference group, writes the terms of reference and recruits the external evaluation team.

**Desk phase (phase 1)**

The external evaluation team analyses the intervention logic on the basis of official documents and proposes the evaluation questions and judgment criteria (also called "reasoned assessment criteria"). The evaluation questions are validated by the reference group.

The team then specifies the indicators and provides partial answers to the questions on the basis of existing information.

It identifies the assumptions to be tested in the field and develops its work plan for data collection and analysis.

**Field phase (phase 2)**

The evaluation team implements its work plan for data collection in the partner country or countries. It applies the specified techniques and begins to test the assumptions.

**Synthesis phase (phase 3)**

The evaluation team draws up its final report, which includes the findings and conclusions which respond to the questions asked, as well as an overall assessment. This report also includes recommendations that are clustered and prioritised. The final report is subject to a quality assessment.

**Dissemination and follow-up phase (phase 4)**

The evaluation (report, executive summary, article and/or presentation) is disseminated to policy-makers, to the concerned services and partners, and is posted on the Commission's website. The uptake of the recommendations is monitored.

1. “***Monitoring and Evaluation are the heart of the principles and practices of project management” Discuss***

**A project** is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources.

**Project management**, then, is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Monitoring and Evaluation as the heart of the principles and practice of project management, helps the project to meet the project requirement or achieved its intended goal by; Monitoring and evaluation are separate practices dedicated to the assessment the Project’s overall performance. Monitoring is a systematic and long-term process that gathers information in regards to the progress made by an implemented project. Evaluation is time specific and it’s performed to judge whether a project has reached its goals and delivered what expected according to its original plan.

Monitoring and Evaluation (M&E) are important for you to assess that your project is achieving set targets. For instance, by monitoring the development of the project you will easily understand whether strategic changes need to be made and act accordingly. Second, M&E are relevant to donors who need to assess whether your NGO is a reliable partner. By reviewing milestones and final outcomes of your projects, donors will decide on the accountability of your NGO, upon which further collaborations could be established. Therefore, M&E is part and partial of all stages of project implementation.

1. ***Discuss the benefits of effective stakeholder participation in an evaluation exercise***

Participatory evaluation is an approach that involves the stakeholders of a programme or policy in the evaluation process. This involvement can occur at any stage of the evaluation process, from the evaluation design to the data collection and analysis and the reporting of the study.

Involving stakeholders in the process of an evaluation can lead to "better data, better understanding of the data, more appropriate recommendations, [and] better uptake of findings" (Gujit 2014, p.2). It is ethical to include the people to be affected by a programme or policy in the process to inform relevant decisions.

**Advantages of doing participatory evaluation**

* Empower participants.
* Build capacity.
* Identify locally relevant **evaluation** questions.
* Improve accuracy and relevance of reports.
* Improve program performance.
* Develop leaders and build teams.
* Sustain organizational learning and growth

1. Describe the following terms as used in project Monitoring and Evaluation:  
   (i) **Project monitoring**

Project Monitoring refers to the process of keeping track of all project-related metrics including team performance and task duration, identifying potential problems and taking corrective actions necessary to ensure that the project is within scope, on budget and meets the specified deadlines.  
(ii) **Project evaluation;** Is a systematic and objective assessment of an ongoing or completed project.  
(iii) ***Primary stakeholder***

Primary stakeholders are those that stand to be directly affected, either positively or negatively, by the project, decisions, or actions of the project.  
(iv) ***Scope Creep***

Scope Creep in project management refers to changes, continuous or uncontrolled growth in a project's scope, at any point after the project begins  
(v) ***Impact assessment***

Impact assessment is an evaluation whose purpose is to attribute outcomes and impacts to project operations.

1. ***Why is it important to conclude M&E activity by writing a report?***

**M&E reports.** This presents a generic structure of a typical report for an evaluation, study or major monitoring activity. It is important to write an M &E report because of the following; it helps the project manager to document key findings in terms of how much has been achieved, recommendation of corrective measures,

1. Discuss the steps in writing and presenting an Evaluation Report

An evaluation report, in the simplest sense, is a document which reports the results, findings, interpretations, conclusions, or recommendations derived through an evaluation.

Steps in writing an Evaluation Report.

An evaluation report gives the audience a general idea about the whole evaluation. For it to effectively convey information, it needs to be constructed properly. Consider the following tips in writing an evaluation report.

* **Think of a purpose.**This creates the foundation of the evaluation [business report](https://www.examples.com/business/business-report.html). One needs to determine the purpose of creating an evaluation report to determine its focus.
* **Gather the most important details of the evaluation to be included in the report.**
* **Know the audience of your report.**This includes the people who will view the report, its users, and in most cases, the evaluation’s subjects. Anticipate the questions and concerns they might ask regarding the [technical report](https://www.examples.com/business/technical-report.html).
* **Divide the report into different sections.**This will promote better distribution of ideas and contents of the evaluation itself.
* **Write in a clear manner.**This will allow your audience to comprehend the ideas you present better.
* **Proofread your report.**Proofreading is the best way to get rid of the possible errors your report might contain.

Presenting an Evaluation Report.

The following are the key components commonly discussed in an evaluation report.

* **Title or header.**This includes a clear and concise title, the authors’ names, date of preparation, etc.
* **Executive summary.**This should contain a brief summary of the subject of the report.
* **Table of contents.**This includes an overview of the contents of the report and their respective pages.
* **Introductory remarks.**Mainly a [short report](https://www.examples.com/business/write-a-short-report.html) introduction on the purpose, and target of the evaluation.
* **Scope.** This discusses the evaluation focus.
* **Resources and methods.**Materials, equipment, and methods involved in the evaluation.
* **Summary.**Typically includes findings, conclusions, and interpretations derived in the evaluation.
* **Recommendations.**This provides an idea on information dissemination and intended use of the evaluation’s findings and conclusions.
* **References.**This contains the references used by the authors upon [report writing](https://www.examples.com/education/report-writing.html) the evaluation.

1. Identify and explain any four features or characteristics of a project

* **A single definable purpose.**

This is usually specified in terms of cost, schedule and performance requirements.

* **Every project is unique.**

It requires the doing of something different, something that was not done previously.

* **Projects are temporary activities.**

A project is an ad hoc organization of staff, material, equipment and facilities that is put together to accomplish a goal. This goal is within a specific time-frame. Once the goal is achieved, the organization created for it is disbanded or sometimes it is reconstituted to begin work on a new goal (project).

* **A project is the process of working to achieve a goal.**

During the process, projects pass through several distinct phases, which form and are called the project life cycle. The tasks, people, organizations, and other resources will change as the project moves from one phase to the next. The organizational structure and the resource expenditures build with each succeeding phase; peak; and then decline as the project nears completion.

Reference;

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