Monitoring & Evaluation

CIVIL SOCIETY EMPOWERMENT

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Monitoring & Evaluation

Based on a PASSIA Training Course

Prepared by

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PASSIA

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PASSIA
Palestinian Academic Society for the Study of International Affairs

PASSIA, the Palestinian Academic Society for the Study of International Affairs, is an Arab, non-profit Palestinian institution, with a financially and legally independent status. It is not affiliated with any government, political party or organization. PASSIA seeks to present the Question of Palestine in its national, Arab and international contexts through academic research, dialogue and publication.

PASSIA endeavors that its seminars, symposia and workshops, whether international or intra-Palestinian, be open, self-critical and conducted in a spirit of harmony and cooperation.

PASSIA's *Civil Society Empowerment through Training and Skills Development* program has been designed to provide training seminars for Palestinian NGO professionals, practitioners and university graduates, with the aim to improve their operational abilities. It is hoped that this will enable them to deal more efficiently with the tasks ahead in their civil society.

This publication contains the proceedings of the Training Program on *Monitoring and Evaluation*, which was conducted in March/July 2002 by development consultant Khalid Nabris.

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INTRODUCTION

PASSIA's *Civil Society Empowerment through Training and Skills Development* program arose as a response to the need in Palestinian society for the establishment and running of effective organs of civil society. Aimed at imparting a solid theoretical background as well as fostering essential practical skills, the program was designed to play an important part in the development of a variety of skills vital in the achievement of both individual and organizational goals.

Believing that it is the human resources that make up the fundamental pillar of Palestinian society, PASSIA established a series of seminar and workshop based training courses, which incorporate theoretical and practical training in areas relevant to the present and future role of Palestinian civil society organizations.

Each of the seminars PASSIA runs as a part of this training program includes three interrelated activities:

1. *Preparation.* Approximately three weeks before the actual training program begins, participants are provided with preparatory reading material gathered by the PASSIA Project Team in coordination with the trainers and lecturers. The participants are also required to write a short paper on an issue related to the course subject.

2. *Intensive Training Seminar.* Trainees attend a five-day lecture program conducted by local and international experts. The lectures range from theoretical concepts to functional skills, exercises and case studies, whereby the participants are continuously encouraged to apply what they have learned to the institutions with which they are involved.

3. *Follow-up Program.* The intensive seminar is followed by two workshop days, concentrating on skill enhancement. The major goal is to link and apply the skills learned to actual issues of concern in the participants' working environment. Participants prepare for the workshops by completing practice-oriented writing assignments.

CIVIL SOCIETY EMPOWERMENT: MONITORING AND EVALUATION

This publication presents the proceedings of the **Monitoring and Evaluation** course, which took place in March and July 2002 (the original implementation had to be postponed due to the Israeli reinvasion of Palestinian West Bank cities, including Ramallah, where the seminar was to take place). The book presented here is hoped to serve both as a brief and multifaceted introduction to the issues addressed during this course, as well as a record of the event. The intention is not to replicate the seminars *per se*, as by their very 'workshop-style' nature they do not immediately lend themselves to print. However, by giving the reader a brief window on some highly varied methodologies and analyses, it is hoped that a broad introduction into the field of monitoring and evaluation can be achieved.

The rationale for the PASSIA training program on *Monitoring and Evaluation* was the lack of use and knowledge of M&E tools and practices in Palestinian society. The course was thus designed to improve the overall capacity for efficient project management and implementation through the application of M&E techniques, including measurement of achievements, review processes, and appropriate information collection. Targeted were participants working in project planning and implementation whose responsibilities include monitoring, evaluation and project appraisal.

THIS PUBLICATION

The following report is meant to be used as a handbook and, as such, PASSIA hopes it will allow for the widest possible dissemination of the course material and instructions amongst the Palestinian civil society community. The aim is to provide a practical tool that will empower a large number of NGO and other practitioners with knowledge and skills from which they can clearly benefit.

The PASSIA Project Team
October 2002

1   MONITORING AND EVALUATION: BASIC CONCEPTS AND DEFINITIONS

1.1   INTRODUCTION

Monitoring and evaluation (M&E) of development projects are increasingly recognized as indispensable management functions. For many years, M&E of development projects in Palestine have been given little attention. Some of the main constraints and problems that hampered M&E in development project include: weak interest and commitment to the evaluation function by both donors and Palestinian civil society organizations, weak culture of carrying out, sharing, discussing and using the results of evaluation activities among Palestinian NGOs and donors, a relative shortage of professional evaluation experts (in comparison with researchers, trainers, etc.), insufficient technical resources, limited monitory allocation to M&E work by donors, limited training opportunities in evaluation, shortage of trained staff, etc.

The last few years have witnessed an increased interest in strengthening project M&E by donors and Palestinian civil society organizations. More Palestinian nonprofit and civil society organizations are interested in strengthening their M&E capacity. This document reviews the nature of program M&E, presents basic concepts, principles, tools and methods of M&E, reviews the process of planning and implementing effective M&E processes for nonprofit programs, and suggests ways for using M&E results. Many of the principles presented in this document are also applicable for "for-profit" organizations.

There are many reasons why development project staff and managers of civil society organizations should know about M&E. *First*, knowledge about M&E helps project staff to improve their ability to effectively monitor and evaluate their projects, and therefore, strengthen the performance of their projects. We should remember that project staff need not be evaluation experts in order to monitor their projects; with basic orientation and training, project staff can implement appropriate techniques to carry out a useful evaluation. *Second*, program evaluations, carried out by inexperienced persons, might be time-

consuming, costly and could generate impractical or irrelevant information. *Third*, if development organizations are to recruit an external evaluation expert they should be smart consumers aware of standards, and know what to look for and require in this service.

1.2   THE NEED FOR MONITORING AND EVALUATION

There are many reasons for carrying out project M&E.

- Project managers and other stakeholders (including donors) need to know the extent to which their projects are meeting their objectives and leading to their desired effects.

- M&E build greater transparency and accountability in terms of use of project resources.

- Information generated through M&E provide project staff with a clearer basis for decision-making.

- Future project planning and development is improved when guided by lessons learned from project experience.

1.3   PROJECT MONITORING

Monitoring represents an on-going activity to track project progress against planned tasks. It aims at providing regular oversight of the implementation of an activity in terms of input delivery, work schedules, targeted outputs, etc. Through such routine data gathering, analysis and reporting, program/project monitoring aims at:

1) Providing project management, staff and other stakeholders with information on whether progress is being made towards achieving project objectives. In this regard, monitoring represents a continuous assessment of project implementation in relation to project plans, resources, infrastructure, and use of services by project beneficiaries.

2) Providing regular feedback to enhance the ongoing learning experience and to improve the planning process and effectiveness of interventions.

3) Increasing project accountability with donors and other stakeholders.

4) Enabling managers and staff to identify and reinforce initial positive project results, strengths and successes. As well, monitoring alerts managers to actual and potential project weaknesses, problems and shortcomings before it is too late. This would provide managers with the opportunity to make timely adjustments and corrective actions to improve the program/project design, work plan and implementation strategies.

5) Checking on conditions or situations of a target group, and changes brought about by project activities. In this regard, monitoring assists project management to check whether the project continues to be relevant to the target group and/or geographical area, and whether project assumptions are still valid.

Monitoring actions must be undertaken throughout the lifetime of the project. Ad hoc evaluation research might be needed when unexpected problems arise for which planned monitoring activities cannot generate sufficient information, or when socio economic or environmental conditions change drastically in the target area.

Effective monitoring needs adequate planning, baseline data, indicators of performance, and results and practical implementation mechanisms that include actions such as field visits, stakeholder meetings, documentation of project activities, regular reporting, etc. Project monitoring is normally carried out by project management, staff and other stakeholders.

1.4　PROJECT EVALUATION

Program/project evaluation represents a systematic and objective assessment of ongoing or completed projects or programs in terms of their design, implementation and results. In addition, evaluations usually deal with strategic issues such as program/project relevance, effectiveness, efficiency (expected and unexpected), in the light of specified objectives, as well as program/project impact and sustainability. Those terms are described in detail in the following sections and in the glossary.

Periodic evaluations of ongoing projects are conducted to review implementation progress, predict project's likely effects and highlight necessary adjustments in project design. Terminal evaluations (or final evaluations) are evaluations carried out at the end of a project to provide an overall assessment of project performance and effects/impact, as well as to assess the extent to which the project has succeeded in meeting their objectives and their potential sustainability.

There are many reasons for conducting an evaluation, including:

1) Providing managers with information regarding project performance. Project plans might change during the implementation process. Evaluations can verify if the program is really running as originally planned. In addition, they provide signs of project strengths and weaknesses, and therefore, enable managers to improve future planning, delivery of services and decision-making.

2) Assisting project managers, staff and other stakeholders to determine in a systematic and objective manner the relevance, effectiveness, and efficiency of activities (expected and unexpected) in light of specified objectives.

3) Mid-term evaluations may serve as a means of validating the results of initial assessments obtained from project monitoring activities.

4) If conducted after the termination of a program/project, an evaluation determines the extent to which the interventions are successful in terms of their impact and sustainability of results.

5) Assisting managers to carry out a thorough review and re-thinking about their projects in terms of their goals and objectives, and means to achieve them.

6) Generating detailed information about project implementation process and results. Such information can be used for public relations, fundraising, promotion of services in the community, as well as identifying possibilities for project replication.

7) Improving the learning process. Evaluations often document and explain the causes as to why activities succeeded or failed. Such documentation can help in making future activities more relevant and effective.

As in monitoring, evaluation activities must be planned at the program/project level. Baseline data and appropriate indicators of performance and results must be established.

Evaluation goals and objectives should be determined by project management and staff. Many organizations do not have the resources to carry out the ideal evaluation. Therefore, it is preferred that they recruit an external evaluation consultant to lead the evaluation process. This would increase the objectivity of the evaluation. Project strengths and weaknesses might not be interpreted fairly when data and results are

analyzed by project staff members that are responsible for ensuring that the program is successful.

In case the organization does not have the technical expertise to carry out the evaluation and can not afford outside help, or prefers to carry out the evaluation using its own resources, it is recommended to engage an experienced evaluation expert to advise on developing the evaluation plan, selecting evaluation methods, and analyzing and reporting results.

1.5 RELATIONSHIP BETWEEN MONITORING AND EVALUATION

Monitoring and evaluation are two different management tools that are closely related, interactive and mutually supportive. Through routine tracking of project progress, monitoring can provide quantitative and qualitative data useful for designing and implementing project evaluation exercises. On the other hand, evaluations support project monitoring. Through the results of periodic evaluations, monitoring tools and strategies can be refined and further developed.

Some might argue that good monitoring substitutes project evaluations. This might be true in small-scale or short-term projects, or when the main objective on M&E is to obtain information to improve the process on implementation of an ongoing project. However, when a final judgment regarding project results, impact, sustainability, and future development are needed, an evaluation must be conducted.

Project evaluations are less frequent than monitoring activities, considering their costs and time needed.

The following table provides a comparison between monitoring and evaluation:

Item	Monitoring	Evaluation
Frequency	Periodic, regular	Episodic
Main action	Keeping track/oversight	Assessment
Basic purpose	Improving efficiency Adjusting work plan	Improve effectiveness, impact, future programming
Focus	Inputs/outputs, process outcomes, work plans	Effectiveness, relevance, impact, cost-effectiveness
Information sources	Routine systems, field observations, progress reports, rapid assessments	Same plus surveys/studies
Undertaken by	Project managers Community workers Community (beneficiaries) Supervisors Funders	Program managers Supervisors Funders External evaluators Community (beneficiaries)

Source: UNICEF, *A UNICEF Guide for Monitoring and Evaluation: Making a Difference?* New York, 1991, p.3.

2 MONITORING AND EVALUATION AS AN INTEGRAL COMPONENT OF THE PROJECT PLANNING AND IMPLEMENTATION PROCESS

Monitoring and evaluation are integral components of the program/ project management cycle. Used at all stages of the cycle, monitoring and evaluation can help to strengthen project design, enrich quality of project interventions, improve decision-making, and enhance learning. Likewise, the strength of project design can improve the quality of monitoring and evaluation. It is important to remember that poorly designed projects are hard to monitor or evaluate. The following section summarizes the logical framework approach to project planning, implementation, and monitoring and evaluation.

2.1 THE LOGICAL FRAMEWORK APPROACH TO PROJECT DESIGN, IMPLEMENTATION AND EVALUATION

The logical framework approach provides a structure for logical thinking in project design, implementation and monitoring and evaluation. It makes the project logic explicit, provides the means for a thorough analysis of the needs of project beneficiaries and links project objectives, strategies, inputs, and activities to the specified needs. Furthermore, it indicates the means by which project achievement may be measured.

The detailed description of the processes of designing a program/ project using the logical framework is beyond the scope of this report. However, the following section provides a summary of the milestones and main concepts and definitions[1]:

- Problem analysis represents the first step in project design. It is the process through which stakeholders identify and analyze the prob-

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[1] Parts of this section are adapted from the following source: www.ausaid.gov.au/ ausguide/

lem(s) that the project is trying to overcome. The result of this analysis is usually summarized in a tree diagram that links problems with their causes.

- Next, project goals and objectives are developed and structured in a hierarchy to match the analysis of problems. They can be represented as a mirror image of the problem tree diagram. While projects are usually designed to address long-term sectoral or national goals, objectives are specific to the project interventions. They should also be clear, realistic in the timeframe for their implementation and measurable for evaluation. Examples: school dropouts (in a geographical area or for a target group) will be reduced by 10% (within a specific timeframe), agricultural products (in a geographical area or for a target group) will be increased by 15% (within a specific timeframe), etc.

- Outputs are the immediate physical and financial results of project activities. Examples: kilometers of agricultural roads constructed, number of schools renovated, number of farmers attended a training course; number of textbook printed, etc.

- Activities and inputs are developed to produce the outputs that will result in achieving project objectives.

The product of this analytical approach is usually summarized in a matrix called the logical frame matrix, which summarizes what the project intends to do and how, what kind of effects are expected, what the project key assumptions are, and how outputs and outcomes will be monitored and evaluated (see below).

The columns of the logical frame matrix represent the levels of project objectives (hierarchy of objectives) and the means to achieve them. There are four levels in the logical frame and each lower level of activity must contribute to the achievement of a higher level. For example, the implementation of project activities would contribute to the achievement of project outputs. The achievement of the project outputs would lead to the achievement of project objectives. This is called the vertical logic. The rows indicate how the achievement of objectives can be measured and verified. This is called the horizontal logic. Assumptions (situations needed to promote the implementation of the project) must be systematically recorded.

The Logical Frame Matrix Structure

Project Description	Indicators	Means of Verification (MOV)	Assumptions
Goal: The broader development impact to which the project/ program contributes- at a national and/or sectoral level.	Measures of the extent to which a contribution to the goal has been made. Used during evaluation.	Sources of information and methods used to collect and report it.	
Purpose: The development outcome expected at the end of the project. All components will contribute to this.	Conditions at the end of the project indicating that the Purpose has been achieved. Used for project completion and evaluation.	Sources of information and methods used to collect and report it.	Assumptions concerning the purpose/ goal linkage.
Component Objectives: The expected outcome of producing each component's outputs.	Measures of the extent to which component objectives have been achieved. Used during review and evaluation.	Sources of information and methods used to collect and report it.	Assumptions concerning the component objective/purpose linkage.
Outputs: The direct measurable results (goods and services) of the project which are largely under project management's control.	Measures of the quantity and quality of outputs and the timing of their delivery. Used during monitoring and review.	Sources of information and methods used to collect and report it.	Assumptions concerning the output/ component objective linkage.
Activities: The tasks carried out to implement the project and deliver the identified outputs.	Implementation/work program targets. Used during monitoring.	Sources of information and methods used to collect and report it.	Assumptions concerning the activity/ output linkage.

A brief description of the terminology is given below:

Project description provides a narrative summary of what the project intends to achieve and how. It describes the means by which desired ends are to be achieved.

Goal refers to the sectoral or national objectives for which the project is designed to contribute, e.g. increased incomes, improved nutritional status, reduced crime. It can also be referred to as describing the expected impact of the project. The goal is thus a statement of intention that explains the main reason for undertaking the project.

Purpose refers to what the project is expected to achieve in terms of development outcome. Examples might include increased agricultural

production, higher immunization coverage, cleaner water, or improved local management systems and capacity. There should generally be only one purpose statement.

Component Objectives Where the project/program is relatively large and has a number of components, it is useful to give each component an objective statement. These statements should provide a logical link between the outputs of that component and the project purpose. Poorly stated objectives limit the capacity of M&E to provide useful assessments for decision-making, accountability and learning purposes.

Outputs refer to the specific results and tangible products (goods and services) produced by undertaking a series of tasks or activities. Each component should have at least one contributing output, and often have up to four or five. The delivery of project outputs should be largely under project management's control.

Activities refer to all the specific tasks undertaken to achieve the required outputs. There are many tasks and steps to achieve an output. However, the logical frame matrix should not include too much detail on activities because it becomes too lengthy. If detailed activity specification is required, this should be presented separately in an activity schedule/Gantt chart format and not in the matrix itself.

Inputs refer to the resources required to undertake the activities and produce the outputs, e.g., personnel, equipment and materials. The specific inputs should not be included in the matrix format.

Assumptions refer to conditions which could affect the progress or success of the project, but over which the project manager has no direct control, e.g. price changes, rainfall, political situation, etc. An assumption is a positive statement of a condition that must be met in order for project objectives to be achieved. A risk is a negative statement of what might prevent objectives being achieved.

Indicators refer to the information that would help us determine progress towards meeting project objectives. An indicator should provide, where possible, a clearly defined unit of measurement and a target detailing the quantity, quality and timing of expected results. Indicators should be relevant, independent and can be precisely and objectively defined in order to demonstrate that the objectives of the project have been achieved (see below).

Means of verification (MOVs). Means of verification should clearly specify the expected source of the information we need to collect. We need to consider how the information will be collected (method), who

will be responsible, and the frequency with which the information should be provided. In short MOVs specify the means to ensure that the indicators can be measured effectively, i.e. specification of the indicators, types of data, sources of information, and collection techniques.

2.2 LINK BETWEEN THE LOGICAL FRAME AND MONITORING AND EVALUATION

The horizontal logic of the matrix helps establish the basis for monitoring and evaluating the project by asking how outputs, objectives, purpose and goal can be measured, and what are the suitable indicators. The following table summarizes the link between the logical frame and monitoring and evaluation.

Logical frame hierarchy	Type of monitoring and evaluation activity	Indicators
Goal	Ex-post evaluation	Impact indicators
Purpose	Program Review	Outcome indicators
Component Objectives	Periodic and final evaluation	Outcome indicators
Outputs	Monitoring/periodic evaluation	Output indicators
Activities/Inputs	Monitoring	Output indicators

It is worth noting that the above table represents a simplified framework and should be interpreted in a suitably flexible manner. For example, ex-post evaluation assesses whether or not the purpose, component objectives and outputs have been achieved. Project/program reviews are concerned with performance in output delivery and the extent of achieving objectives.

Indicators

Indicators provide the quantitative and qualitative details to a set of objectives. They are statements about the situation that will exist when an objective is reached, therefore, they are measures used to demonstrate changes in certain conditions or results of an activity, a project or a program. In addition, they provide evidence of the progress of program or project activities in the attainment of development objectives. Indicators should be pre-established, i.e. during the project design phase. When a direct measure is not feasible, indirect or proxy indicators may be used.

Indicators should be directly linked to the level of assessment (e.g. output indicators, outcome indicators or impact indicators). Output indicators show the immediate physical and financial outputs of the project. Early indications of impact (outcomes) may be obtained by surveying beneficiaries' perceptions about project services. Impact refers to long-term developmental change. Measures of change often involve complex statistics about economic or social welfare and depend on data that are gathered from beneficiaries.

They should also be clearly phrased to include change in a situation within a geographical location, time frame, target etc. A popular code for remembering the characteristics of good indicators is SMART.

S: Specific
M: Measurable
A: Attainable (i.e., can be checked)
R: Relevant (reflect changes in the situation)
T: Trackable (can be tracked over a specific period of time)

Source: ITAD, Monitoring and the Use of Indicators, consultancy report to DG VIII, European Commission, Brussels, 1996.

Notes and Comments:

1. Classifying project objectives into different levels requires that management will need to develop systems to provide information at all levels, from basic accounting through sophisticated studies, in order to measure project outcomes.

2. There are different means for measuring project indicators:

- Input indicators can be provided from management and account-ing records. Input indicators are used mainly by managers clos-est to the tasks of implementation.

- Output indicators are directly linked to project activities and in-puts. Management of the project have control of project activities and their direct results or outputs. Those outputs can be verified through internal record keeping and analysis.

- By contrast, the achievement of project objectives normally de-pends on a number of factors. Some might be controlled by the project, other cannot. For example, the response of beneficiaries to project services is beyond the control of the project. Re-sponses of beneficiaries regarding benefits brought to them by the project require consultation and data collection.

- Project outcome are often measured through the assessment of indicators that focus on whether beneficiaries have access to project services, level of usage and satisfaction with services. Such evidence can also be provided easily and accurately through impact research, e.g. changes in health status or im-provements in income.

3. Exogenous indicators focus on general social, economic and envi-ronmental factors that are out of the control of the project, but which might affect its outcome. Those factors might include the perform-ance of the sector in which the project operates. Gathering data on project indicators and the wider environment place an additional burden on the project's M&E effort.

4. The importance of indicators could be changed during project im-plementation. For example, monitoring and evaluation focus at an early stage of the project is on input and process indicators. Empha-sis shifts later to outputs and impact. In other words, emphasis is first placed on indicators of implementation progress, and later on indicators of development results.

   M&E designers should examine existing record keeping and re-porting procedures used by the project authorities in order to assess the capacity to generate the data that will be needed.

5. Some of the impact indicators, such as mortality rates or improve-ment of the household income, are hard to attribute to the project in a cause-effect relation. In general, the higher the objective, the

more difficult the cause-effect linkages become. Project impact will almost certainly be a result of a variety of factors, including that of the project itself. In such situation, the evaluation team might use comparisons with the situation before the project (baseline data), or in areas not covered by the project.

6. To maximize the benefits of M&E, the project should develop mechanisms to incorporate the findings, recommendations and lessons learned from evaluations into the various phases of the program or project cycle.

Suggested Reading:

Appleton, Simon, "Problems in Measuring Changes in Poverty over Time," *IDS Bulletin,* Vol. 27, No. 1, 1996. Brighton, UK: Institute for Development Studies.

Casley, Dennis J. and Krishna Kumar, *Project Monitoring and Evaluation in Agriculture.* Washington, D.C.: World Bank, 1987.

Operations Evaluation Department, World Bank, "Building Evaluation Capacity", *Lessons & Practices No. 4,* November 1994. --- "Monitoring and Evaluation Plans in Staff Appraisal Reports in Fiscal Year 1995". *Report No. 15222,* December 1995.

3   EVALUATION TYPES AND MODELS

3.1   OVERVIEW OF TYPES OF EVALUATIONS

Program evaluations are carried out at different stages of project planning and implementation. They can include many types of evaluations (needs assessments, accreditation, cost/benefit analysis, effectiveness, efficiency, formative, summative, goal-based, process, outcomes, etc.). The type of evaluation you undertake to improve your programs depends on what you want to learn about the program.

In general, there are two main categories of evaluations of development projects:

Formative evaluations (process evaluations) examine the development of the project and may lead to changes in the way the project is structured and carried out. Those types of evaluations are often called interim evaluations. One of the most commonly used formative evaluations is the midterm evaluation.

In general, formative evaluations are process oriented and involve a systematic collection of information to assist decision-making during the planning or implementation stages of a program. They usually focus on operational activities, but might also take a wider perspective and possibly give some consideration to long-term effects. While staff members directly responsible for the activity or project are usually involved in planning and implementing formative evaluations, external evaluators might also be engaged to bring new approaches or perspectives. Questions typically asked in those evaluations include:

- To what extent do the activities and strategies correspond with those presented in the plan? If they are not in harmony, why are there changes? Are the changes justified?

- To what extent did the project follow the timeline presented in the work plan?

- Are activities carried out by the appropriate personnel?

- To what extent are project actual costs in line with initial budget allocations?

- To what extent is the project moving toward the anticipated goals and objectives of the project?

- Which of the activities or strategies are more effective in moving toward achieving the goals and objectives?

- What barriers were identified? How and to what extent were they dealt with?

- What are the main strengths and weaknesses of the project?

- To what extent are beneficiaries of the project active in decision-making and implementation?

- To what extent do project beneficiaries have access to services provided by the project? What are the obstacles?

- To what extent are the project beneficiaries satisfied with project services?

Summative evaluations (also called outcome or impact evaluations) address the second set of issues. They look at what a project has actually accomplished in terms of its stated goals. There are two types of summative evaluations. (1) *End evaluations* aim to establish the situation when external aid is terminated and to identify the possible need for follow up activities either by donors or project staff. (2) *Ex-post evaluations* are carried out two to five years after external support is terminated. The main purpose is to assess what lasting impact the project has had or is likely to have and to extract lessons of experience.

Summative evaluation questions include:

- To what extent did the project meet its overall goals and objectives?

- What impact did the project have on the lives of beneficiaries?

- Was the project equally effective for all beneficiaries?

- What components were the most effective?

- What significant unintended impacts did the project have?

- Is the project replicable?

- Is the project sustainable?

For each of these questions, both quantitative data (data expressed in numbers) and qualitative data (data expressed in narratives or words) can be useful.

Summative evaluations are usually carried out as a program is ending or after completion of a program in order to "sum up" the achievements, impact and lessons learned. They are useful for planning follow-up activities or related future programs. Evaluators generally include individuals not directly associated with the program.

3.2 OVERVIEW OF SUMMATIVE EVALUATION MODELS

Terms like "outcome" and "impact" are often used interchangeably. A distinction should be made. Outcomes refer to any results or consequences of an intervention or a project. Impact is a particular type of outcome. It refers to the ultimate results (i.e. what the situation will be if the outcome is achieved). A UNICEF publication clarifies the relationship between the two terms:

> *"Some people distinguish between outcomes and impacts, referring to outcomes as short-term results (on the level of purpose) and impacts as long-term results (on the level of broader goals). Outcomes are usually changes in the way people do things as a result of the project (for example, mothers properly treating diarrhea at home), while impacts refer to the eventual result of these changes (the lowered death rate from diarrhea disease). Demonstrating that a project caused a particular impact is usually difficult since many factors outside the project influence the results."* (UNICEF, *A UNICEF Guide for Monitoring and Evaluation: Making a Difference?*, New York, 1991, p. 40.)

Impact evaluation should be carried out only after a program or project has reached a sufficient level of stability. It is usually preceded by an implementation evaluation to make sure that the intended program/ project elements have been put in place and are operational before we try to assess their effects. Assessing the impact at an early stage is meaningless and a waste of resources.

The main question that impact evaluations try to answer is whether the intervention or project has made a difference for the target groups. There are different ways to find out and prove if the intervention or project has made a difference. Those ways are referred to as evaluation models.

Evaluation models differ in the extent to which they are able to identify and prove project outcome or impact and link them with project interventions, i.e. to make a causal link between the two. Some models are more likely than others to generate reliable results that could establish a causal link. In evaluation terms this is called the scientific rigor or validity of the model. There are many evaluation models. The following section reviews two commonly used models: the *pretest-posttest model* and the *comparison group model*.

A. Pretest-Posttest Model

The basic assumption of this model is that without project interventions, the situation that existed before the implementation of the project will continue as did before. As a result of the intervention, the situation will change over time. Therefore, we measure the situation before the project starts and repeat the same measures after the project is completed. The differences or changes between the two points in time can be attributed to the project interventions.

To increase the validity of this model, we have to control some biases that might result from the application of the model. For example the pre and posttests should be the same, measures should be taken from the same groups, etc. In addition, to establish a strong link between project interventions and project impact, the model should take into account other biases that might occur between the two points in time. Some of those biases might be out of the project control, i.e., social, political, economic, and environmental factors.

Advantages: The main advantage of the pretest-posttest model is that it is relatively easy to implement. It can be implemented with the same group of project beneficiaries (does not require a control or comparison group). It does not usually require a high level of statistical expertise to implement and is able to assess progress over time by comparing the results of projects against baseline data.

Disadvantages: The main disadvantage of the pre and posttest model is that it lacks scientific rigor. There are many biases that might take place between the pretest and the posttest that could affect the results, and therefore, weaken the direct link between project interventions and project outcomes or impact. In other words, changes in the situation before and after project implementation might (at least in part) be attributed to other external factors. This problem could be reduced by adopting what is called the multiple time-series model, i.e. repeating the measures at different points of time during the implementation of the project and not only at the beginning and end points of time. This way, results of measures can be tracked over time and the effects of

the external factors can be assessed and controlled. However, this might increase the work burden and expand the cost of the evaluation.

Implementation Steps: Applying the pretest posttest model involves the following main stages:

1. Prepare a list of indicators that would test project outcomes.

2. Design evaluation tools and instruments for data collection.

3. Apply the tools and instruments with the target group or a representative sample of the target group at the pretest time (at the beginning or the project implementation phase or before the implementation starts).

4. Repeat the same measures at the posttest time (at the end of the project implementation phase) with the same target group or a representative sample of the target group.

5. Analyze, compare and interpret the two sets of evaluation data.

6. Report findings.

B. Comparison Group Model

This evaluation model assesses project outcomes or impact through the comparison between project results on two comparable groups at the same period of time (say the end of project implementation phase). The first group represents beneficiaries of the project and the second represents a group that has not benefited from the project. To control for design biases, the two groups should have the same characteristics in many aspects (socioeconomic status, gender balance, education, and other geographic and demographic aspects). Difference between the two groups could be attributed to the project interventions.

Advantages: This model has relatively strong scientific rigor. It is able to link project impact with project interventions or to attribute outcomes to the intervention. The implementation of this model is relatively easy when naturally existing comparison groups can be found.

Disadvantages: In many situations it is difficult to find a comparison group. In addition, working with two different groups might increase the research burden and increase the cost of evaluation.

Implementation Steps: Applying the comparison group model involves the following main stages:

1. Prepare a list of indicators that would test project outcomes.

2. Design evaluation tools and instruments for data collection.

3. Select a comparison group based on an appropriate set of criteria.

4. Apply the tools and instruments with the target and comparison groups, or representative samples of both, at the same time.

5. Analyze, compare and interpret the two sets of evaluation data.

6. Report findings.

3.3   BASELINE SURVEY AND DATA

Evaluating the impact or results of a project is difficult to prove if we do not know the situation prior to the project implementation. Baseline surveys are those surveys carried out before project implementation start to generate data about the existing situation of a target area or group. Such data becomes the reference against which project/program impact can be assessed when summative evaluations are carried out. For example, if the objective of the project is to reduce school dropout rates, we have to know those rates prior to project implementation and compare them with rates after the completion of the project.

Baseline surveys are especially important when the pretest posttest evaluation model is adopted. The logic behind carrying out baseline surveys is that by comparing data that describe the situation to be addressed by a project or a program and data generated after the completion of the project, evaluators would be able to measure progress or changes in the situation and link those changes to project interventions. As well, baseline data might be useful to track changes that the project would bring about over time and to refine project indicators that are important for project monitoring or for evaluating project impact.

Baseline surveys are especially important for assessing project higher-level objectives. Special focus is given to gathering information about various indicators developed to measure project effects. Both quantitative and qualitative information are used in baseline surveys (see next section). To control biases in methodological indicators, methods and tools used in the baseline survey should be repeated when carrying out summative evaluations.

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3.4 REVIEW OF KEY OUTCOME AND IMPACT EVALUATION INDICATORS

There are a number of interrelated dimensions of programs and projects to measure their success including: effectiveness, efficiency, relevance, impact, and sustainability. Following is a summary review of each of those dimensions:

1. Effectiveness

Effectiveness in simple terms is the measure of the degree to which the formally stated project objectives have been achieved or can be achieved. To make such measure and verification possible, project objectives should be defined clearly and realistically. Often, evaluators have to deal with unclear and highly general objectives that are hard to assess: "upgraded health conditions," "improved living conditions" or unrealistic objectives (in comparison with allocated resources, time or level of activities). In such situations, the measurement of effectiveness becomes difficult. Evaluators have to work with project staff to try to operationalize those objectives based on existing documents and to draw clear and realistic objectives as the point of reference for measuring effectiveness.

2. Efficiency

Efficiency is the measure of the economic relationship between the allocated inputs and the project outputs generated from those inputs (i.e. cost effectiveness of the project). It is a measure of the productivity of the project, i.e., to what degree the outputs achieved derive from an acceptable cost. This includes the efficient use of financial, human and material resources. In other words, efficiency asks whether the use of resources in comparison with the outputs is justified.

This might be easy to answer in the field of business. In such situations, the main difficulty in measuring efficiency is to determine what standards to follow as a point of reference. The question, however, becomes more difficult in the social context especially when ethical considerations are involved. For example, how can we answer if spending X amount of dollars to save the lives of Y number of children or to rehabilitate Z number of disabled persons is justified. What are the acceptable standards in such situations?

In the absence of agreed upon and predetermined standards, evaluators have to come up with some justifiable standards. Following is a list of recommendations that evaluators may use:

- Compare project inputs and outputs against other comparable activities and projects.

- Use elements of best practice standards.

- Use criteria to judge what might be reasonable.

- Ask questions such as: could the project or intervention achieve the same results at a lower cost? Could the project achieve more results at the same cost?

3. Relevance

Relevance is a measure used to determine the degree to which the objectives of a program or project remain valid as planned. It refers to an overall assessment to determine whether project interventions and objectives are still in harmony with the needs and priorities of beneficiaries. In other words; are the agreed objectives still valid? Is there a sufficient rationale for continuing the project or activity? What is the value of the project in relation to other priority needs? Is the problem addressed still a major problem?

Society's priorities might change over time as a result of social, political, demographic or environmental changes. As a result, a given project might not be as important as it was when it was initiated. For example, once an infectious epidemic has been eradicated, the justification for the project that dealt with the problem might no longer exist. Or, if a natural disaster happens, society's priorities shifts to emergency or relief interventions, and other projects and interventions might become less important.

In many cases, the continuation of project relevance depends on the seriousness, quality of needs assessment and the rationale upon which the project has been developed.

4. Impact

Project impact is a measure of all positive and negative changes and effects caused by the project, whether planned or unplanned. While effectiveness focuses only on specific positive and planned effects expected to accrue as a result of the project and is expressed in terms of the immediate objective, impact is a far broader measure as it includes both positive and negative project results, whether they are intended, or unintended. Impact is often the most difficult and demanding part of the evaluation work since it requires the establishment of complex causal conditions that are difficult to prove unless a strong evaluation model and a diverse set of techniques are used.

In assessing impacts, the point of reference is the status of project beneficiaries and stakeholders prior to implementation. Questions often asked in impact evaluations include: what are the results of the project? what difference has the project made to the beneficiaries and how many have been affected? What are the social, economic, technical, environmental, and other effects on the direct or indirect individual beneficiaries, communities and institutions? What are the positive or negative, intended and unintended, effects that come about as a result of the project activities?

Project impacts can be immediate and long-range. Project staff and evaluators should decide how much time must elapse until project impacts are generated. For example, an agricultural project may produce important impacts after only a few months – whereas an educational project might not generate significant effects until several years after the completion of the project. Therefore, it is important to design the program or project in a way that will lend itself to impact assessment at a later stage, e.g., through the preparation of baseline data, setting of indicators for monitoring and evaluation, etc.

5. Sustainability

Sustainability in simple terms is a measure of the continuation of the project program or positive results after external support has been concluded. It has become a major issue in development work and evaluation of projects.

Many development initiatives fail once the implementation phase is over because neither the target group or responsible organizations have the means, capacity or motivation to provide the resources needed for the activities to continue. As a result, many development organizations became more interested in the long-term and lasting improvements of projects. In addition, many donors are becoming interested to know for how long should they need to support a project before it can run with local resources.

During the last decade, the concept of sustainability has been developed from merely asking whether the project has succeeded in contributing to the achievement of its objectives or whether the project will be able to cover its operational costs from local sources to a broader set of issues including if there is an indication whether the positive impacts are likely to continue after the termination of external support. In addition, environmental, financial, institutional and social dimensions have become major issues in the assessment of sustainability.

Since sustainability is concerned with what happens after external support is completed, it should ideally be measured after the completion of the project. It will be difficult to provide definitive assessment of sustainability while the project is still running. In such cases, the assessment will have to be based on projections about future developments.

There are a number of factors that can be used to ensure that project interventions are likely to become self-sustaining and continue after the termination of external funding, including:

- economic (future expenses, especially recurrent costs)
- institutional (administrative capacity, technical capacity, institutional motivation, ownership of the project, etc.)
- social (community interest, political will, etc.)
- factors related to overall environmental benefits.

4   MONITORING AND EVALUATION METHODS AND TOOLS

4.1   REVIEW OF MAIN METHODS AND TOOLS

Evaluations often produce controversial results. Therefore, they might be criticized, especially in terms of whether data collection methods, analysis and results lead to reliable information and conclusions that reflect the situation.

Methods of data collection have strengths and drawbacks. Formal methods (surveys, participatory observations, direct measurement, etc.) used in academic research would lead to qualitative and quantitative data that have a high degree of reliability and validity. The problem is that they are expensive. Less formal methods (field visits, unstructured interviews, etc.) might generate rich information but less precise conclusions, especially because some of those methods depend on subjective views and intuitions.

Qualitative methods, especially participatory methods of data collection, can bring rich and in-depth analysis of the situation of the beneficiaries of projects and new insights into peoples' needs for project planning and implementation. However, they demand more skills than most quantitative methods. In addition, they require time and substantial talent in communication and negotiation between planners and participants.

The quality of information, especially in terms of validity and reliability, should be a main concern for the evaluator. The evaluator may simultaneously employ a number of methods and sources of information in order to cross-validate data (triangulation). Triangulation is a term used to describe the simultaneous use of multiple evaluation methods and information sources to study the same topic. It provides the means to generate rich and contextual information. As well, it provides the means to verify information and explain conflicting evidence.

The following table provides an overview of some of the quantitative and qualitative data collection methods commonly used during evaluations.

Method	Description/ Purpose	Advantages	Disadvantages/ Challenges
Literature search	Gather background information on methods and results of evaluation methods used by others.	Economic and efficient way of obtaining information.	Difficult to assess validity and reliability of secondary data.
Questionnaires / surveys	Oral interviews or written questionnaires of a representative sample of respondents. Most appropriate when need to quickly and/or easily get lots of information from people in a non-threatening way.	* Produce reliable information. * Can be completed anonymously. * Easy to compare and analyze. * Can be administered easily to a large number of people. * Collect a lot of data in an organized manner. * Many sample questionnaires already exist.	* Demanding and could be costly. * Might not get careful feedback. * Wording can bias client's responses. * Data is analyzed for groups and are impersonal. * Surveys may need sampling expert. * Provide numbers but do not get the full story. * Open-ended data may be difficult to analyze.
Interviews	To fully understand someone's impressions or experiences, or learn more about their answers to questionnaires. Individual or group interviews could be organized to assess perceptions, views and satisfaction of beneficiaries.	* Give full range and depth of information and yield rich data, details and new insights. * Can be flexible with the client. * Permit face-to-face contact with respondents and provide opportunity to explore topics in depth. * Allow interviewer to probe, explain or help clarify questions, increasing the likelihood of useful responses. * Allow interviewer to be flexible in administering interview to particular individuals or circumstances.	* Can be hard to analyze and compare. * Interviewer can bias responses. * Can be expensive and time-consuming. * Need well-qualified and highly trained interviewers. * Interviewee may distort information through recall errors, selective perceptions and desire to please interviewer. * Flexibility can result in inconsistencies across interviews. * Volume of information too large and may be difficult to reduce data.
Documentation review	Impression of how program operates without interrupting the program by review of	* Give comprehensive and historical information * Doesn't interrupt program or client's	* Often takes a lot of time * Information may be incomplete. Quality of documen-

	applications, finances, memos, minutes, etc.	routine in program * Information already exists. * Few biases about information.	tation might be poor. * Need to be clear about purpose. * Not a flexible means to get data. Data restricted to what already exists.
Observation	Involves inspection, field visits and observation to understand processes, infrastructure/services and their utilization. Gathers accurate information about how a program actually operates, particularly about processes.	* Well-suited for understanding processes, views, operations of a program while they are actually occurring. * Can adapt to events as they occur and exist in natural, unstructured and flexible setting. * Provides direct information about behavior of individuals and groups. * Permits evaluator to enter into and understand situation/ context. * Provides good opportunities for identifying unanticipated outcomes.	* Dependent on observer's understanding and interpretation. * Has limited potential for generalization. * Can be difficult to interpret exhibited behaviors. * Can be complex to categorize observations. * Can influence behavior of program participants. * Can be expensive and time-consuming. * Needs well-qualified, highly trained observers and/or content experts. * Investigator has little control over situation.
Focus groups	A focus group brings together a representative group of 8 to 10 people, who are asked a series of questions related to the task at hand. Used for analysis of specific, complex problems, in order to identify attitudes and priorities in sample groups. Explore a topic in depth through group discussion, e.g., about reactions to an experience or suggestion, understanding common complaints, etc.	* Efficient and reasonable in terms of cost. * Stimulate the generation of new ideas. * Quickly and reliably gets common impressions * Can be an efficient way to get a wide range and depth of information in a short time. * Can convey key information about programs. * Useful in project design and in assessing the impact of a project on a given set of stakeholders.	* Can be hard to analyze responses. * Need good facilitators. * Difficult to schedule 8-10 people together.

Case studies	In-depth review of one or a small number of selected cases. To fully understand or depict beneficiaries' experiences in a program, and conduct comprehensive examination through cross comparison of cases.	* Well-suited for understanding processes and for formulating hypotheses to be tested later. * Fully depicts client's experience in program input, process and results. * Powerful means to portray program to outsiders.	* Usually time consuming to collect, organize and describe. * Represents depth of information, rather than breadth.
Key informant interviews	Interviews with persons who are knowledgeable about the community targeted by the project. A key informant is a person (or group) who has unique skills or professional background related to the issue/intervention being evaluated, is knowledgeable about the project participants and/or has access to other information of interest to the evaluator.	* Flexible, in-depth approach. * Easy to implement. * Provides information concerning causes, reasons and/or best approaches from an "insider" point of view. * Advice/feedback increases credibility of study. * May have side benefit to solidify relationships between evaluators, beneficiaries and other stakeholders.	* Risk of biased presentation/ interpretation from informants/interviewer. * Time required to select and get commitment may be substantial. * Relationship between evaluator and informants may influence type of data obtained. * Informants may interject own biases and impressions.
Direct measurement	Registration of quantifiable or classifiable data by means of an analytical instrument.	* Precise. * Reliable and often requiring few resources.	Registers only facts, not explanations.

Source: Information on common qualitative methods is provided in the earlier *User-Friendly Handbook for Project Evaluation* (NSF 93-152).

4.2   SELECTING MONITORING AND EVALUATION METHODS

Monitoring is an ongoing function and can be incorporated into daily management operations. It can involve a wide range of methods such as interviews with project beneficiaries, field visits, regular reports, observations, interviews with key informants, etc.

Evaluation can involve a number of methods. No recipe or formula is best for every situation. Some methods are better suited for the collection of certain types of data. Each has advantages and disadvantages in terms of costs and other practical and technical considerations (such as ease of use, accuracy, reliability, and validity). For example, there is

no best way to conduct interviews. Your approach will depend on the practical considerations of getting the work done during the specified time period. Using a focus group - which is essentially a group interview - is more efficient than one-on-one interviews, if done well. However, people often give different answers in groups than they do individually. They may feel freer to express personal views in a private interview. At the same time, group conversations can draw out deeper insights as participants listen to what others are saying. Both approaches have value.

Project staff and evaluators must weigh pros and cons against program goals. In selecting evaluation methods, evaluators consider the use of methods that could generate the most useful and reliable information, be the most cost-effective and is the easiest to implement in a short period of time.

Following is a list of questions that might help in selecting appropriate evaluation methods:

1. What information is needed?

2. Of this information, how much can be collected and analyzed in a low-cost and practical manner, e.g., using questionnaires, surveys and checklists?

3. How accurate will the information be?

4. Will the methods get all of the needed information?

5. What additional methods should and could be used if additional information is needed?

6. Will the information appear as credible to decision makers, e.g., to donors or top management?

7. Are the methods appropriate for the target group? If group members are illiterate, the use of questionnaires might not be appropriate unless completed by the evaluators themselves.

8. Who can administer the methods? Is training required?

9. How can the information be analyzed?

Ideally, the evaluator uses a combination of methods. For example, a questionnaire to quickly collect a great deal of information from a lot of people, and then interviews to get more in-depth information from cer-

tain respondents to the questionnaires. In addition, case studies could then be used for more in-depth analysis of unique and notable cases, e.g., those who did or did not benefit from the program, those who quit the program, etc.

Combining quantitative and qualitative research methods and approaches in monitoring and evaluation of development projects has proved to be very effective.

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5   MONITORING AND EVALUATION PLANNING, DESIGN AND IMPLEMENTATION

Monitoring and evaluation planning and design must be prepared as an integral part of the program/project design. To increase the effectiveness of the M&E systems, program managers should:

- Establish baseline data describing the problems to be addressed and building baseline indicators.

- Make sure that program/project objectives are clear, measurable and realistic.

- Define specific program/project targets in accordance with the objectives.

- Agree with stakeholders on the specific indicators to be used for monitoring and evaluating project performance and impact.

- Define the types and sources of data needed and the methods of data collection and analysis required based on the indicators.

- Specify how the information generated from M&E will be used.

- Specify the format, frequency and distribution of reports.

- Develop a M&E schedule.

- Clarify roles and responsibilities for M&E.

- Allocate an adequate budget and resources for M&E.

It should be noted that the monitoring and evaluation plan should not be seen in a rigid way. The plan should be subject to continuous review and adjustment as required, and a means for an effective learning process.

5.1 Planning a Monitoring System

As mentioned above, evaluation planning and design depend on the type of information needed. The type, quantity and quality of information should be thought of carefully before planning M&E systems.

Project managers usually prepare annual work plans that translate the project document into concrete tasks. The work plans should describe in detail the delivery of inputs, the activities to be conducted and the expected results. They should clearly indicate schedules and the persons responsible for providing the inputs and producing results. The work plans should be used as the basis for monitoring the progress of program/project implementation.

As a management tool, monitoring should be organized at each level of management. Monitoring systems should be linked to annual plans. A first step in designing a monitoring plan is to identify *who* needs what information, *for what purpose,* how *frequently,* and in *what form.* To develop an effective monitoring system, the following steps might be followed:

1. A first step towards developing a good monitoring system is to decide what should be monitored. The careful selection of monitoring indicators organizes and focuses the data collection process.

2. The next question would be how to gather information, i.e. to select methods to track indicators and report on progress (observation, interviews, stakeholder meetings, routine reporting, field visits, etc.).

3. When to gather information by whom. The monitoring plan should include who will gather the information and how often. Project staff at various levels will do most data collection, analysis and reporting. Staff should agree on what the monitoring report should include.

4. Progress reports should be reviewed by project staff and major stakeholders. Feedback should be collected by project managers on a regular basis.

5. The monitoring plan should indicate the resources needed to carry out project monitoring. Needed funds and staff time should be allocated to ensure effective implementation.

5.2 PLANNING AN EVALUATION

There is no "perfect" evaluation design. It is far more important to do something, rather than wait until every last detail has been tested. However, to improve evaluation planning and design, it is useful to consider the following questions and issues:

a. What are the purposes of the evaluation? Which ones are more important than others?

This step involves identifying a manageable number of evaluation purposes and prioritizing them. The best way to decide on the purposes of an evaluation is to ask who needs what type of information and for what reason. When the evaluation purpose has been decided, it must be clearly set forth in the Evaluation Terms of Reference.

b. What evaluation model is the most appropriate for the project or program?

As mentioned earlier, there are many evaluation models that can be considered. Each has some strengths and weaknesses. The evaluation model that a specific project would utilize should be selected during the project design phase. This is especially important if the project plans to include a summative evaluation.

c. When to carry out the evaluation. What is the timing of evaluation within the project cycle?

The timing of major evaluations is determined by the project plan, the identification of significant problems during the course of monitoring, donors' request, etc.

d. What is the scope and focus of the evaluation and questions for the evaluation to answer?

Determining the scope and focus of an evaluation includes identifying the geographic area, type of activity and time period that the evaluation should cover. This would clarify the types of questions to be asked.

e. Methods of gathering data to answer the questions.

Existing data should be identified and its quality assessed. In the process, some questions might be answered. Other data sources might include documents (regular reports, field visits notes, previous evaluation reports, etc.) and data generated by research projects (household surveys, evaluation of similar programs, etc.).

Evaluators should be selective. Extensive data gathering is time-consuming, expensive and can result in mountains of unnecessary information.

f. What resources are needed for the evaluation?

In the early stages of planning an evaluation, resources should be clearly defined. In order for evaluations to be effective, sufficient human, financial and logistic resources should be allocated. We should remember that the amount of available resources, influences the scope and methods of the evaluation.

A UNICEF publication summarizes the evaluation planning process as follows:

- **Why** - The purposes of the evaluation - who can/will use the results.

- **When** - The timing of evaluation in the program cycle.

- **What** - The scope and focus of evaluation and questions for the evaluation to answer.

- **Who** - Those responsible for managing and those responsible for carrying out the evaluation, specifying whether the evaluation team will be internal or external or a combination of both.

- **How** - The methods of gathering data to answer the questions.

- **Resources** - The supplies and materials, infrastructure and logistics needed for the evaluation.

6

DATA ANALYSIS AND REPORT WRITING

6.1 ANALYZING DATA

1. Data Management

Organizing evaluation data is an important step for ensuring effective analysis and reporting. If the amount of quantitative data is very small and you are not familiar with computer software and data entry, you might opt to manually organize and analyze data. However, if the amount of data is huge or you need to carry out sophisticated analysis, you should enter the data into a computer program. There are a number of software packages available to manage the evaluation data, including SPSS, Access, or Excel. Each requires a different level of technical expertise. For a relatively small project, Excel is the simplest of the three programs and should work well as a database software. In any event, the assistance of statisticians and computer experts can be engaged at different stages of the evaluation.

2. Analysis of Quantitative Data

Analyzing the gathered quantitative and qualitative data is a major step in project evaluation. Developing a data analysis plan is important to carry out a successful analysis and interpretation of information gathered by the evaluation. Following are some tips to make sense of the quantitative data:

a. Start with the evaluation goals and objectives:
Before analyzing your data, review your evaluation goals. This will help you organize your data and focus your analysis. For example, if you wanted to improve your program by identifying its strengths and weaknesses, you can organize data into program strengths, weaknesses and suggestions to improve the program. If you are conducting an outcomes-based evaluation, you could categorize data according to the indicators for each outcome. In general, data analysis is facilitated if the project has clear and measurable goals and objectives.

b. Basic analysis of quantitative information

Data analysis often involves the disaggregation of data into categories to provide evidence about project achievements and to identify areas in which a program is succeeding and/or needs improvement. Data can be broken down by gender, social and economic situation, education, area of residence (urban or rural), marital status, age, etc. Decide what type of disaggregation is relevant to your evaluation and project objectives and indicators. One of the main advantages of statistical analysis is that it can be used to summarize the findings of an evaluation in a clear, precise and reliable way. However, not all information can be analyzed quantitatively. The most commonly used statistics include the following:

Frequency Count. A frequency count provides an enumeration of activities, things, or people that have certain pre-specified characteristics. Frequency counts can often be categorized (e.g., 0, 1-5, 6-10, more than 10) in data analysis.

Percentage. A percentage tells us the proportion of activities, things, or people that have certain characteristics within the total population of the study or sample. Percentage is probably the most commonly used statistic to show the current status as well as growth over time.

Mean. The mean is the most commonly used statistic to represent the average in research and evaluation studies. It is derived by dividing the sum by the total number of units included in the summation. The mean has mathematical properties that make it appropriate to use with many statistical procedures.

The level of sophistication of analysis is a matter of concern in evaluation. Tables, percentages and averages often give a clear picture of the sample data particularly for non-specialists, and many users will only be interested in this level of analysis. In addition, measures of spread, including percentiles and standard deviations, may add valuable information on how a variable is distributed throughout a sample population. There is a wealth of more sophisticated research methods that can be applied. However, much of the evaluation work can be done using very basic methods.

3. Analysis of Quantitative Information

The use of both quantitative and qualitative analysis in evaluation has become the preferred model for many evaluators. Most evaluators and researchers agree that they should be employed simultaneously. The analysis of qualitative data helps broaden the view of the phenomena

of interest in an evaluation, but can also increase depth and detail, where needed.

Qualitative data includes detailed descriptions, direct quotations in response to open-ended questions, analysis of case studies, the transcript of opinion of groups, and observations of different types. Qualitative analysis is best done in conjunction with the statistical analysis of related (quantitative or qualitative) data. The evaluation should be designed so that the two sorts of analysis, using different but related data, will be mutually reinforcing.

Analysis of qualitative methods may produce descriptions (patterns, themes, tendencies, trends, etc.), and interpretations and explanations of these patterns. The data analysis should include efforts to assess the reliability and validity of findings. Following is a list of some useful tips to improve your analysis of qualitative data:

- Carefully review all the data.

- Organize comments into similar categories, e.g., concerns, suggestions, strengths, weaknesses, similar experiences, program inputs, recommendations, outputs, outcome indicators, etc.

- Try to identify patterns, or associations and causal relationships in the themes, e.g., all people who attended programs in the evening had similar concerns, most people came from the same geographic area, most people were in the same salary range, processes or events respondents experience during the program, etc.

- Try to combine the results of the quantitative and qualitative data.

It is important to keep all documents for several years after completion in case they are needed for future reference.

6.2   Development of an Evaluation Report

There is no common format for reporting. Following is a list of tips that might help in improving your evaluation reports:

a. Start the preparation of the evaluation report at an early stage.
It is useful to start the preparation of the report before data collection. There are a number of sections that can be prepared by using the material of the evaluation plan or proposal (background section, information about the project and some aspects of the methodology, evaluation questions, etc.). Those will remain the same throughout the evaluation. The evaluation findings, conclusions, and recommendations generally need to wait for the end of the evaluation.

Evaluations generate huge amount of information. Therefore, it is useful to organize evaluation data and field notes as soon as they are collected and to document fieldwork experiences and observations as soon as possible. Finally, preparing sections of the findings chapter during the data collection phase allows researchers to generate preliminary conclusions or identify potential trends that need to be assessed by additional data collection activities.

b. Make the report short and concise

One of the most challenging tasks that evaluators face is how to organize the huge amount of data gathered into a useful, concise and interesting report and what data to include and not to include. It is useful to remember that only a small and concise amount of tabulations prepared during the analysis phase should be reported. A report outline will help in classifying information. Always abide by your key evaluation questions, the indicators you are assessing and the type of information that your audience needs.

Make your recommendations clear, concise and direct. Examples include:

1. Ways for improving management of the program (planning, decision making, policy development, etc.) and where capacity building/technical assistance and training are needed.

2. Actions needed to increase effects of the project.

3. Actions needed to improve monitoring and evaluation processes and methods.

4. Topics for further research.

c. Make the presentation interesting

Remember that the level and content of evaluation reports depend on for whom the report is intended, e.g., donors, staff, beneficiaries, the general public, etc. Presentation must be clear and adjusted to the target group. The presentation must be made in simple language that can be understood by non-professionals. Following is a list of suggestions that might help in making your report more interesting and easier to read:

1. The first sentence of paragraphs should be used to make the main point, and the remainder to supplement, substantiate and discuss the main point.

2. As much as possible, use a short text. This will ensure that a large number of people will read it.

3. The structure of the report should be simple. The text should be broken down in relatively small thematic or sequential parts, with simple and clear subtitles precisely identifying the topics discussed.

4. Make the report interesting to read. Display your data in graphs, diagrams, illustrations and tables that summarize numbers. This should

reduce the amount of text needed to describe the results. Furthermore, they are more effective than written text. Do not explain the graphs or illustrations in written form. Focus only on the important points that relate to the problem under discussion. Use of qualitative information effectively makes the report more interesting. In addition, direct quotes, short examples and comments heard during fieldwork personalize the findings, and photographs help in familiarizing readers with the conditions of the project beneficiaries.

5. Use simple language that the readers will understand. Avoid the use of long and complicated sentences, unclear jargon and/or difficult words. Important technical terms should be defined in the text or in the glossary at the end of the report.

6. Different main ideas should be presented in separate sentences.

7. The meaning of abbreviations and colloquial words should be explained.

8. Simple link words should be used to split sentences and indicate the direction in which the argument is moving. Link words should be simple, such as "also," "even so," "on the other hand," and "in the same way." Avoid long words like "moreover," "nevertheless," and "notwithstanding."

9. Only data tables or diagrams should contain detailed numbers. The written text should highlight the most important numbers and say what they mean. Percentages should in most cases be rounded up to the nearest whole number. It should be possible for the reader to get the main message from a table without consulting the text. Every table must have a title, table number, reference to the source of information, sample size, and full description of what each figure refers to.

10. Use space around the text. Ease of reading and understanding is more important than reducing the volume of pages.

Consider the following format for your report:

Suggested Contents of Evaluation Report

1. Title page

2. Table of Contents

3. Acknowledgments (optional)
  • Identify those who contributed to the evaluation.

4. Executive Summary
  • Summarize the program/project evaluated, the purpose of the evaluation and the methods used, the major findings, and the recommendations in priority order.
  • Two to three pages (usually) that could be read independently without reference to the rest of the report.

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5. *Introduction*
- Identify program/project description/background.
- Describe the program/project being evaluated (the setting and problem addressed, objectives and strategies, funding).
- Summarize the evaluation context (purposes, sponsors, composition of the team, duration).

6. *Evaluation Objectives and Methodology*
- List the evaluation objectives (the questions the evaluation was designed to answer).
- Describe fully the evaluation methods and instruments (e.g., what data were collected, specific methods used to gather and analyze them, rationale for visiting selected sites).
- Limitations of the evaluation.

7. *Findings and Conclusions*
- State findings clearly with data presented graphically in tables and figures. Include effects of the findings on achievement of program/project goals.
- Explain the comparisons made to judge whether adequate progress was made.
- Identify reasons for accomplishments and failures, especially continuing constraints.

8. *Recommendations*
- List the recommendations for different kinds of users in priority order. Include costs of implementing them, when possible.
- Link recommendations explicitly with the findings, discussing their implication for decision-makers.
- Include a proposed timetable for implementing/reviewing recommendations.

9. *Lessons Learned (optional)*
- Identify lessons learned from this evaluation for those planning, implementing or evaluating similar activities.

10. *Appendices*
- Terms of Reference.
- Instruments used to collect data/information (copies of questionnaires, surveys, etc.).
- List of persons interviewed and sites visited.
- Data collection instruments.
- Case studies.
- Abbreviations.
- Any related literature.
- Other data/ tables not included in the findings chapter.

Source: UNICEF, *A UNICEF Guide for Monitoring and Evaluation: Making a Difference?*, New York. 1991.

7   USE OF MONITORING AND EVALUATION RESULTS

Results of evaluations can be used in many ways:

1. Dissemination of the report

Disseminate of the report to various interested and related parties that might use it. Potential users include: the funding organization (for the program or evaluation), project managers and staff, board members of the organization, partner organizations/interested community groups and other stakeholders, the general public, and external resources (researchers, consultants, professional agencies, etc.).

Apart from distributing the evaluation report itself, common ways to disseminate evaluation information are through the evaluation summaries, annual reports, bibliographies, thematic reports, seminars, press releases, websites, newsletters, etc. The entire report should be distributed to administrators and donors. The executive summary could be distributed more widely, for example to other policy-making staff, political bodies or others involved in similar programs.

2. Improvement of project/ program performance

The evaluation report highlights project strength and weaknesses and suggested solutions to major problems. While it is important to know if the program is achieving its goals and objectives, it is also important that the project manager and staff are able to use the results to plan follow-up actions to further strengthen the program.

The project manager and staff should prepare an action plan to implement follow-up activities. The action plan should have a time line and should identify individuals responsible for carrying out the planned activities. The implementation of the follow-up action plan needs to be monitored and evaluated. This makes program evaluation, both implementation and impact, an integral part of a process for continuous improvement.

3. Development of new projects

One of the objectives of evaluations is to feed into the next planning phases of the programming cycle of the organization as well as to provide a baseline for future planning. Findings of evaluations reflect the situation of the target group and highlight follow up actions. Such recommendations could be used to design new projects or interventions, or to further develop existing projects.

4. Policy development

Results of evaluations could be discussed at regional or national levels through seminars or workshops to discuss policy implications. Planners on the policy-level can use evaluation results for decision-making.

If the evaluation is well done and recommends policy changes, program managers can use it as a tool for advocacy. Good evaluations forcefully demonstrate the potential beneficial impact of suggested policy changes.

5. Advocacy to increase support to the project

Evaluations can be used as a tool to obtain further support for the program/project. By documenting what has been achieved, evaluators help project leaders gain the support of government officials, increase credibility in the community and raise funds from donors, especially if the results of the evaluation affirm that the project goals remain valid.

Appendices

Appendix 1

Glossary

Activities What a program does with its inputs. Examples are construction of a kindergarten, computer training for youth, counseling of women, raising public awareness regarding childhood diseases, etc. Program *activities* result in *outputs*.

Background The contextual information that describes the reasons for the project, including its goals, objectives, and stakeholders' information needs.

Baseline data A baseline study is the analysis describing the situation prior to the implementation of the project, which is used to determine the results and accomplishments of an activity, and which serves as an important reference for the summative evaluation.

Case study An intensive, detailed description and analysis of a single project, program, or instructional material in the context of its environment. Study based on a small number of "typical" examples. Results provide in-depth review of the case but are not statistically reliable.

Conclusion (of an evaluation) A reasoned judgment based on a synthesis of empirical findings or factual statements corresponding to a specific circumstance.

Context (of an evaluation) The combination of factors accompanying the study that may have influenced its results, including geographic location, timing, political and social climate, economic conditions, and other relevant professional activities in progress at the same time.

Data Information. The term "data" often describes information stored in numerical form. Hard data is precise numerical information. Soft data is less precise verbal information. Raw data is the name given to survey information before it has been processed and analyzed.

Data collection method The way facts about a program and its outcomes are gathered. Data collection methods often used in program evaluations include literature search, file review, natural observations, surveys, expert opinion, case studies, etc.

Development objective The ultimate and long-term objective of the development impact, which is expected to be attained after the project purpose is achieved.

Direct beneficiaries Usually institutions and/or individuals who are the direct recipients of technical cooperation aimed at strengthening their capacity to undertake development tasks that are directed at specific target groups. In micro-level interventions, the direct beneficiaries and the target groups are the same.

Effectiveness A measure of the extent to which a project or program is successful in achieving its objectives.

Efficiency A measure of the "productivity" of the implementation process – how economically inputs are converted into outputs, or the optimal transformation of inputs into outputs.

Evaluation An examination as systematic and objective as possible of an on going or completed project or program, its design, implementation and results, with the aim of determining its efficiency, effectiveness, impact, sustainability and the relevance of the objectives. The purpose of an evaluation is to guide decision-makers.

Evaluation design The logical model or conceptual framework and the methods used to collect information, analyze data and arrive at conclusions.

External evaluation Evaluation conducted by an evaluator from outside the organization within which the object of the study is housed.

Finding Factual statement about the program or project based on empirical evidence gathered through monitoring and evaluation activities.

Focus group A small group selected for its relevance to an evaluation that is engaged by a trained facilitator in a series of discussions designed for sharing insights, ideas, and observations on a topic of concern to the evaluation.

Impact The positive and negative changes produced by a program or a component, directly or indirectly, intended or unintended.

In depth interview A guided conversation between a skilled interviewer and an interviewee that seeks to maximize opportunities for the expression of a respondent's feelings and ideas through the use of open-ended questions and a loosely structured interview guide.

Indicators Quantitative or qualitative statements, which can be used to describe situations that exist and to measure changes or trends over

a period of time. Indicators are used to measure the degree of fulfillment of stated objectives, outputs, activities and inputs.

Inputs The funds, personnel, materials, etc., necessary to produce the intended outputs of development activities.

Lesson learned Learning from experience that is applicable to a generic situation rather than to a specific circumstance.

Key informant Person carefully chosen for interview because of his/her special knowledge of some aspect of the target population.

Logical framework approach A tool for development planning and monitoring applied by some donor agencies.

Monitoring A continuing function that aims primarily to provide program or project management and the main stakeholders of an ongoing program or project with early indications of progress or lack thereof in the achievement of program or project objectives.

Objective Purpose or goal representing the desired result that a program or project seeks to achieve. A development objective is a long-term goal that a program or project aims to achieve in synergy with other development interventions. An immediate objective is a short-term purpose of a program or project.

Outcome indicators The specific items of information that track a program's success on outcomes. They describe observable, measurable characteristics or changes that represent achievement of an outcome.

Outcomes Results of a program or project relative to its immediate objectives that are generated by the program or project outputs. Examples: increased rice yield, increased income for the farmers.

Outputs The planned results that can be guaranteed with high probability as a consequence of development activities/inputs. They are the direct results of program activities.

Program A group of related projects or services directed toward the attainment of specific (usually similar or related) objectives.

A time-bound intervention that differs from a project in that it usually cuts across sectors, themes and/or geographic areas, involves more institutions than a project, and may be supported by different funding sources.

Project A planned undertaking designed to achieve certain specific objectives within a given budget and within a specified period of time.

A time-bound intervention that consists of a set of planned, interrelated activities aimed at achieving defined objectives.

Project document A document that explains in detail the context, objectives, expected results, inputs, risks and budget of a project.

Qualitative evaluation The approach to evaluation that is primarily descriptive and interpretative. Observations that are categorical rather than numerical and often involve attitudes, perceptions and intentions.

Quantitative evaluation The approach to evaluation involving the use of numerical measurement and data analysis based on statistical methods.

Recommendations Suggestions for specific actions derived from analytic approaches to the program components.

Relevance The degree to which the rationale and objectives of an activity are, or remain, valid, significant and worthwhile, in relation to the identified priority needs and concerns.

Reliability A measurement is reliable to the extent that, when repeatedly applied to a given situation, it consistently produces the same results if the situation does not change between the applications. Reliability can refer to the stability of the measurement over time or the consistency of the measurement from place to place.

Results A broad term used to refer to the effects of a program or project. The terms "outputs", "outcomes" and "impact" describe more precisely the different types of results.

Stakeholders Groups that have a role and interest in the objectives and implementation of a program or project. They include target groups, direct beneficiaries, those responsible for ensuring that the results are produced as planned, and those that are accountable for the resources that they provide to that program or project.

A person, group, organization or other body who has a "stake" in the area or field where interventions and assistance are directed. Target groups are always stakeholders, whereas other stakeholders are not necessarily target groups.

Structured interview An interview in which the interviewer asks questions from a detailed guide that contains the questions to be asked and the specific areas for probing.

Subjective data Observations that involve personal feelings, attitudes and perceptions. Subjective data can be quantitatively or qualitatively measured.

Sustainability Durability of positive program or project results after the termination of the technical cooperation channeled through that program or project. *Static sustainability* is the continuous flow of the same benefits, set in motion by the completed program or project, to the same target groups. *Dynamic sustainability* is the use or adaptation of program or project results to a different context or changing environment by the original target groups and/or other groups.

Sustainability factors Six areas of particular importance to ensure that aid interventions are sustainable, i.e. institutional, financial and economic, technological, environmental, socio-cultural, and political.

Target groups The main stakeholders of a program or project that are expected to gain from the results of that program or project. Sectors of the population that a program or project aims to reach in order to address their needs based on gender considerations and their socio-economic characteristics.

Terms of Reference (ToR) Action plan describing objectives, results, activities and organization of a specific endeavor. Most often used to describe technical assistance, study assignments, or evaluations.

Triangulation In an evaluation, triangulation is an attempt to get a fix on a phenomenon or measurement by approaching it via several (three or more) independent routes. This effort provides redundant measurement.

APPENDIX 2

SELECTED INTERNET RESOURCES

GENERAL SOURCES ON (NGO) MANAGEMENT

http://www.clearinghouse.net/
(Links to guides on Fundraising, Grants, Non-Profit Organizations, Public Services; click sub-category Business & Employment).

http://www.fundsnetservices.com/main.htm
(Resources on Funding, Grant Writing, Non-Profit, Research and Educational Resources).

http://www.not-for-profit.org/
(Nonprofit Resource Center with a comprehensive directory of links and information on issues such as Fundraising & Philanthropy; Volunteers & Human Resources; Advocacy & Public Relations; Board & Organizational Support; Management Consultants; Publications; and Research & Policy Studies).

http://comnet.org/net/
(Gateway to sites for the nonprofit community, organized by resource topics such as Education, Government, Grants & Funding, Health Care Services, Human Services, and Political Activism).

http://www.boardsource.org/main.htm
(Dedicated to building stronger NGO boards and NGOs; focus on NGO Governance).

http://www.escape.ca/~rbacal/articles.htm
(Online articles on Nonprofit Management Problems, Solutions & Issues; Training, Development, Learning & Human Resources; Defusing Hostility & Cooperative Communication; Change Management: Teams & Team Development, etc.).

http://www.mapnp.org/
(The Nonprofit Managers' Library: information, materials and links on topics such as Administrative Skills; Boards; Chief Executive; Communication Skills; Ethics for Managers; Finances; Fundraising/Grant Writing; Marketing/Public Relations; Management & Leadership; Training & Development; Personnel & Policies; Program Evaluation; Strategic Planning; Quality Management; and Volunteer Management).

http://shortguides.com/nonprofit
(Information and resources about Nonprofit Organizations, including Funding, Management, Technology, Philanthropy, Volunteer Activity, Programs and Activities).

http://www.fundraising.co.uk/
(Everything on Fundraising: information, links, strategies, agencies).

http://www.idealist.org/
*(Huge database on NGOs worldwide, including publications, materials, programs and links. See **http://www.idealist.org/tools/tools.htm** for a list of useful resources for starting and managing a nonprofit organization. Categories include Financial Management, Foundations, Fundraising, Government Relations, Lobbying, Management, Personnel Management, and Public Relations).*

http://www.tmcenter.org/library/links.html
(Extensive list of links and resources for Nonprofit Organizations).

http://fdncenter.org/
*(Includes an online library – see **http://fdncenter.org/onlib/onlib.html** - with links to nonprofit resources, including: Material on Grant Seeking; a Guide to Funding Research and Resources; a Proposal Writing Course; Literature on the Nonprofit Sector; and Common Grant Application Forms).*

http://www.jsi.com/idr/
(Links, information and reports from the Institute of Development Research, an independent nonprofit research and education center).

http://www.worldlearning.org/
(Educational services NGO working in International Development, Training and Capacity Building, NGO Management, and Democratic Participation).

http://www.innonet.org/
(Free resources for Nonprofit and Public Agencies).

HUMAN RESOURCES

http://www.nwlink.com/~donclark/hrd.html
(Website for Human Development Resources, including articles, online Training Guides, links to Training, Human Resource Development, and Learning Information).

http://www.tcm.com/trdev/
(Training & Development Resource Center for Human Resources).

http://www.astd.org/
(Website of the American Society for Training and Development with information, tools, articles and links to training, performance, evaluation, etc.).

MONITORING AND EVALUATION

http://ctb.lsi.ukans.edu/tools/EN/part_1010.htm
(Community tool box for evaluating programs and initiatives).

http://ericae.net/
(Clearing house for assessment, evaluation and research methodology).

http://www.casanet.org/program-management/evaluation/index.htm
(Reports and manuals on evaluation).

http://www.mapnp.org/library/evaluatn/evaluatn.htm
(Everything on evaluation activities in organizations, types of evaluations, online guides, etc.).

http://www.ncrel.org/tandl/eval2.htm
(Evaluation design and tools for the why, what and how of evaluation).

http://www.hc-sc.gc.ca/hppb/familyviolence/html/1project.htm
(Guide to Project Evaluation).

http://www.ehr.nsf.gov/EHR/REC/pubs/NSF97-153/start.htm
(User-Friendly Online Handbook for Mixed Method Evaluations).

http://oerl.sri.com/
(Online Evaluation Resource Library).

http://www.horizon-research.com/publications/stock.pdf
(Comprehensive guide to evaluating programs).

http://www.idrc.ca/evaluation/documents/rebk1512.pdf
(Resource book on monitoring and evaluation of program performance).

http://www.usaid.gov/pubs/usaid_eval/ and
http://www.dec.org/usaid_eval/
(USAID evaluation publications).

http://www.ehr.nsf.gov/RED/EVAL/handbook/handbook.htm
(User-Friendly Handbook for Project Evaluation).

http://www.interaction.org/evaluation/tips.html
(Evaluation resources, tips and best practices).

http://www.unfpa.org/ooe/toolkit.htm
(The UNFPA Program Manager's Monitoring and Evaluation Toolkit).

http://www.mande.co.uk/news.htm
(News service focusing on developments in monitoring and evaluation methods relevant to development projects and programs with social development objectives).

http://www.unicef.org/reseval/
(Evaluation and monitoring methods and tools and many related resources).

http://www.eval.org/
(American Evaluation Association's homepage devoted to improve Evaluation Practices and Methods; has a lot of good material and links).