COUNCIL for
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Monitoring Versus Evaluation

A brief overview of these terms and their application for development actors

Introduction

Monitoring and evaluation (M&E) often get grouped together and understood as the same process. This factsheet outlines the two processes and explains how they differ in their application in the development sector.

Definitions:

Monitoring

Monitoring can be defined as the 'systematic and routine collection of information from projects and programmes'. It tracks progress against set plans and checks compliance to establish standards. It focuses on what is being done and how it is being done. Monitoring should include the views of beneficiaries and community level stakeholders. Monitoring is usually undertaken by the people implementing the project/programme. The results of monitoring are used to modify the inputs and activities to ensure that the project/programme reaches its intended goal or outcome. Monitoring usually focuses on key indicators of progress or behaviour change. An indicator can be quantitative or qualitative which provides a reasonably simple and reliable basis for assessing achievement, change and performance. These indicators are normally developed at the start of the project cycle and a baseline is undertaken to gauge the starting point. An endline study will look at the progress made at the end of the process compared with the baseline.

Some of the common types of monitoring include; results monitoring, process (activity) monitoring, compliance monitoring, context (situation) monitoring, beneficiary monitoring, financial monitoring and organisational monitoring.

Evaluation

Evaluations are used to draw conclusions about a project/programme's relevance, effectiveness, efficiency, impact and sustainability. Evaluation is an 'analysis or interpretation of the collected data which delves deeper into the relationships between the results'. It looks at the effects and the overall impact of the project/programme.

Distinguishing between monitoring and evaluation:

Monitoring	Evaluation
Monitoring is a continuing function that takes place throughout the implementation of an activity.	Evaluation assesses the entire project cycle.
Monitoring is a regular part of project or programme management. It focuses on the implementation of the project, comparing what is delivered with what was planned.	Evaluation reviews the achievements of the activity and considers whether the plan was the best one to achieve the outcomes. Evaluation measures achievements, as well as positive/negative and intended/unintended effects. Evaluation looks for lessons to be learned from both success and lack of success, and also looks for best practices which can be applied elsewhere.
Monitoring is usually done by people directly involved in implementing the project/programme.	Evaluation is best conducted by an independent outsider who can be impartial in consulting with project/programme staff.
Data collected and insights in the course of monitoring are then fed into and used by the evaluation process.	

Evaluation can be internally or externally led, but is not usually facilitated by those who implement the project/programme. An evaluation may be undertaken by a team with specific diverse skills. There are a number of types of evaluations including formative evaluations, summative evaluations, mid-term and final evaluations, real time evaluations, meta evaluations, thematic evaluations or ex-post evaluations.

Why is M&E important?
The monitoring and evaluation process is important for the development sector and NGOs as it is a way for actors to show stakeholders how a project/programme is being implemented and received, and how effective the project is. Monitoring and evaluation allow for actors to report and showcase their projects/programmes. In addition they enable the wider development community to learn from others, identifying the successes and challenges in order to improve the implementation of future projects/programmes. Monitoring and evaluation reports are often used as the basis for funding proposals as they show whether the project is effective enough to warrant continued funding.

Power dynamic
The voice of the people is crucial for effective monitoring and evaluation. Robert Chambers (father of participatory development approaches) points out that those who are in poverty are the best judges of how they have been affected. Therefore development actors need to involve recipients in evaluating whether a programme is effective.

Conclusion
Monitoring and evaluation are individual processes that have distinct roles in development projects. Together they are crucial to improving development programmes. Effective monitoring and evaluation means the wider sector can learn from the successes and challenges. In addition it helps stakeholders evaluate the value of projects for future funding, and to identify future areas of work.

The main difference between monitoring and evaluation is their timing and focus of assessment. Monitoring is ongoing and tends to focus on what is happening, while evaluations are conducted at specific points in time to assess how well it happened and what difference it made. Monitoring data is typically used by managers for ongoing project/programme implementation, tracking outputs, budgets, compliance with procedures, etc. Evaluations may also inform implementation (e.g. a mid-term evaluation), but they are less frequent and examine larger changes (outcomes) that require more methodological rigour in analysis, such as the impact and relevance of an intervention. While recognising their differences, it is also important to remember that both monitoring and evaluation are integrally linked; monitoring typically provides data for evaluation, and elements of evaluation (assessment) occur when monitoring.

References and for more info:
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