



ACADEMY, RESOURCES

What Is Monitoring and Evaluation? A Guide to the Basics

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The development sector loves to measure — and maximize — its impact. Every penny spent is meant to reach beneficiaries, directly or indirectly. That means one of the biggest challenge is using limited resources to reach as many people as possible.

How can development organizations stretch their resources? The best way is to make sure that every cent, person, and chunk of time is used optimally. This is where monitoring and evaluation comes into play.

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What Is Monitoring?

Simply put, monitoring is an ongoing process of collecting and analyzing data to check a program's efficiency. This data is used to plan, monitor and improve programs.

For example, a program providing nutritious meals to school children to reduce prevalence of anemia may do monthly monitoring checks on several factors:

- Number of children fed (to make sure that targets are met)
- If children are falling sick (to check for quality of food)
- Number of people in the field (to know if there is enough manpower to run the program efficiently)
- Number of parents providing nutritious food to their children (to see whether the program has led to positive outcome, such as behavior change)
- Tests for anemia (to check for effectiveness of the program)

Typically, monitoring answers three questions:

The 3 Key Questions of Monitoring



Did the program reach the target group?



Was the program implemented efficiently?

Was the program able to achieve its objectives in the given budget? If not, what was the additional cost and why?



Was the program implemented differently at different sites?

If so, why and how did implementation differ at different program sites?

There are three key elements of monitoring:

- **Continuous process:** Monitoring is also called process evaluation because it is a continuous process that runs through the entire

program. Usually, there is a dedicated M&E officer who handles this process.

- **Regular data collection:** Data is collected at regular intervals (monthly, bi-monthly, or quarterly, for example) using a preset questionnaire, which has metrics that are decided at the beginning of the program. Data is also collected at the beginning of the program, which serves as a baseline.
- **Identify gaps in implementation:** Monitoring data is extremely important because it helps the program make adjustments during the implementation phase. Monitoring helps identify gaps that keep the program from making maximum impact. Changes during implementation help development organizations get better results and use all their resources better.

[Conduct a successful impact assessment survey with this ready-to-use survey template.](#)

What Is Evaluation?

Evaluation is the process to check whether a program has met its objectives. There are several key features of evaluation:

The 3 Key Features of Evaluation



Regular data collection

Data is collected at the beginning and at the end of the program to see how the important indicators have changed.



Robust methodology

Data is collected using a questionnaire designed at the beginning of the program. A well-planned methodology design is important to ensure that all metrics are included and the methods used for collection and analysis are robust and standardized.



Control group

Evaluation includes a control group (which doesn't participate in the program) to measure whether any changes were solely caused by the program.

For example, say that a nonprofit wants to increase coverage of Hepatitis C vaccination in a village. They start a program providing free vaccinations at health centers and through door-to-door services. Evaluation would measure how many people are vaccinated before and after the program to see if coverage has increased.

What if the government is simultaneously running an awareness campaign to encourage Hepatitis C vaccinations? How can the nonprofit know how much of the change in coverage is caused by their program, and how much is caused by the government's program?

This is where the control group (which isn't covered by the nonprofit's program) comes in. Say the control group's coverage increases by 20% and the target group's coverage increases by 50%. Then the nonprofit would know that the government's program led to a 20% increase in vaccination, and their program led to a 30% increase in vaccination.

Evaluation is a critical component for any program, as it allows program designers to identify gaps, strengths, best practices, and learnings that can help them improve implementation in the future. [Read about the seven types of evaluations here.](#)

How to Create a Monitoring and Evaluation Plan

So what is monitoring and evaluation? As the name implies, monitoring and evaluation (M&E) is monitoring followed by evaluation. M&E involves collecting data, monitoring key indicators of a program, and evaluating whether it has met its objectives.

M&E isn't possible without a monitoring and evaluation plan. This is a document that includes the objectives of the program and the activities designed to achieve them.

An M&E plan outlines the procedure that will be used to evaluate whether or not the objectives have been met. It should include the data that will be collected, the method of collection and analysis, how the data will be used, and the resources that will be required to implement this plan.

The whole M&E plan must be aligned to the overall goals of the project. For example, if the program goal is to increase the number of school-going children in a district of Uttar Pradesh, India, every element of the M&E plan will be designed with this objective in mind.

A M&E plan is most effective when it is designed at the beginning of the program. This helps scope and allocate the required resources right at the start. However, the plan should be an ever-evolving process, and it should be revised if there are changes to the program during evaluation.

A M&E plan is critical because it:

- Helps an organization make informed decisions about their program based on evidence.
- Identifies ways to use resources more effectively and efficiently.
- Helps identify the impact of the program, gaps in implementation, and things that worked successfully.
- Provides data that can help convince donors to invest more or help program officers devise alternative approaches to address their problems.

A M&E plan has the following components:

The Components of Monitoring & Evaluation



Program details

This section introduces the program, its need, its objectives, any resources required, and details of the activities to be implemented.



Data collection plan

This section includes data sources and methods for data collection, analysis and reporting. It may also include possible challenges.



Monitoring plan

This section includes the components that will be measured, frequency of data collection, and the indicators that will be used to measure results.



Evaluation plan

This section includes the research design — i.e. how the program will be evaluated and the indicators that will be used to measure the program's outcomes.



How the plan will be used

This section includes all the stakeholders who will access the plan and use the collected data. It also includes where and how the data and findings will be stored, such as a report or dashboard.

It is very important to update the M&E plan as and when there are changes in the program that affect the original plans. [Here's how you can develop an effective M&E framework.](#)

While developing a M&E plan, keep these guiding principles in mind:

The Guiding Principles for Monitoring & Evaluation



Focused

Data collected should focus on the goals of the project and program.



Timely

Data should be collected and shared at the relevant time. If data is shared too late, it's useless.



Usable

Shared data should be easy for all stakeholders to use; for example, a online report that's easy to access and query rather than a written report.



Credible

All techniques for data collection, analysis and reporting should be credible and standardized. This helps ensure the end result is accurate so it can be used for critical decisions.



Ethical

All data should be collected and analyzed ethically. For example, if data is collected through surveys, make sure you get informed consent from each participant.

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The results of a M&E exercise are useful for stakeholders at different levels.

- For program managers, M&E can help improve how a program is implemented.
- For donors and funders, M&E can help them plan future programs.
- For governments, it can help inform policy by showing what programs work or don't work.

If your M&E plan isn't working, [read here to learn about 5 things you could be doing wrong.](#)

In conclusion, a robust M&E program is a long-term tool that can help improve the implementation of ongoing programs as well as help inform decisions on new programs. By revealing critical implementation gaps, M&E plans help make programs more effective. This means that each round of M&E helps organizations reach more people and make even greater impact.

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