



Monitoring and Evaluation

An increasingly important practice for sustainable impact

Agenda

9am-10:30am

- Introductions [10 min]
- Setting the scene [15 min]
- Defining M&E [5 min]
- Identifying forms of M&E [20 min]

Break [10 min]

- How to better support M&E [20 min]
- Resources [10 min]

Close off

Background information



- Asgar Bhikoo
- Impact Investing Lead at E Squared Investments
- Board Member of the South African Monitoring and Evaluation (SAMEA)
- Member of other international societies as well such as the American Evaluation Association and Social Value International. Worked in non-profit sector in an internal, external and funder managed M&E capacity
- I also do M&E Consulting in my personal capacity
- Feel free to connect: <https://www.linkedin.com/in/asgar-bhikoo-5b349320>

1. Setting the scene

The problem: Why M&E, Why MERL?

Availability of Funding

- Foreign aid to South Africa has decreased over time
- Funding is available where to find it is not common knowledge
- Duration of funding is not cast in stone

Changing times

- Organisations are systems
- Contexts shift
- Is the programme participant still the same as before?
- Is your organisation a fit for them? (choice)
- Important stakeholders?
- Digitally transformed environment?

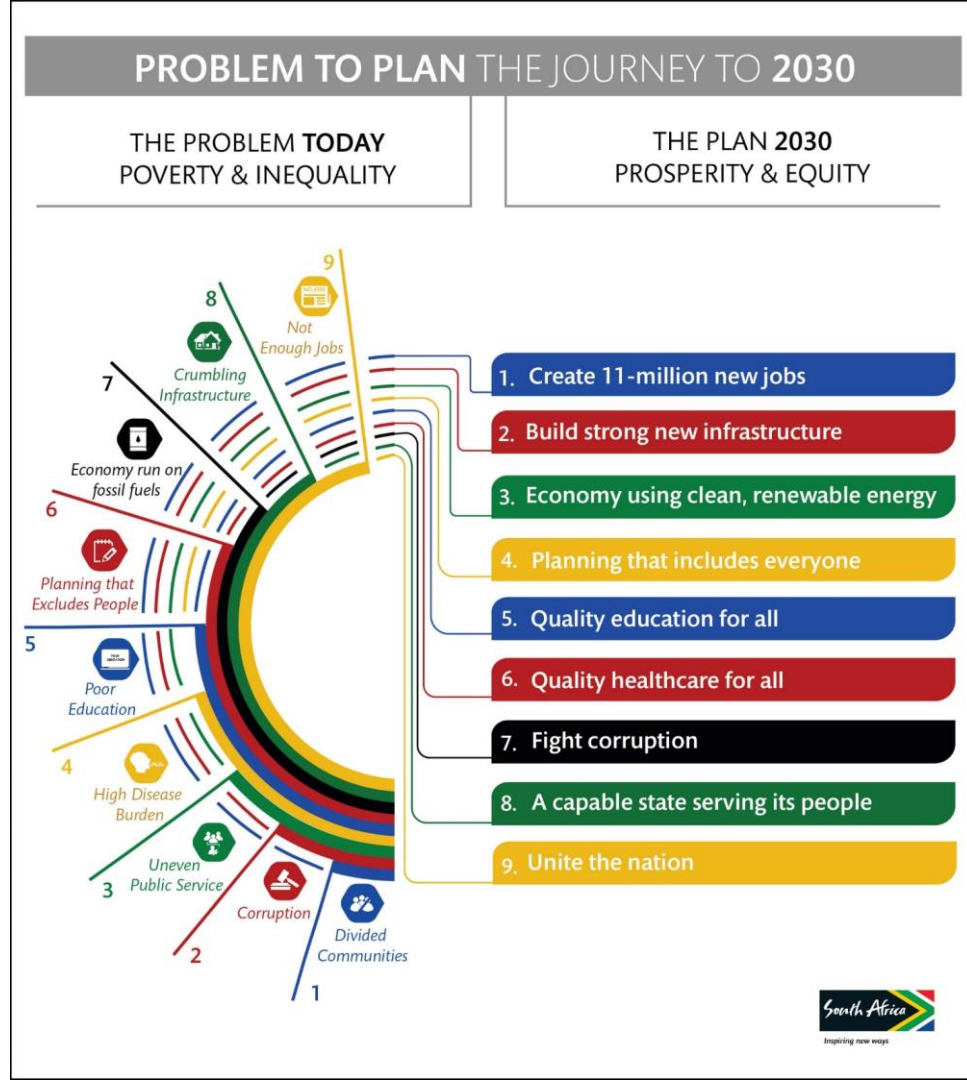
Accountability

- Accountability reporting requirements vary
- Donor-Grantee fit?
- Power dynamics (do we have a say?)
- Terminology (who's M&E approach vs M&E?)

Aligning your Fundraising Pitches and Work to SDGs...(relevance)



Or fit your programmes according into one of these...



Challenges deep-dive

1. Relevance

Big problems that need solving

- Align with SDGs, NDP, IDPs?
- COVID-19 (during the peak of the pandemic)
- System issue?
- Is it an emerging need?

2. Utility

Who is this information for? What do we do with it?

- Interpretation
- Translation
- Exploration
- Communication
- Storage

3. Flexibility and Adaptability

How do we adapt?

- When is the right time?
- Who is accountable?
- What is its effect?
- Why should we adapt?
- How do adapt smartly?

Solution

Look at the work you do differently

Monitoring and evaluation is sometimes seen as a chore if it's seen as something imposed on you. However if it's part of what you do to improve, adapt to be more impactful it can be a vital function in your organisation.

2. Defining M&E

“Monitoring and Evaluation (M&E) is a **continuous management function to assess if progress is made in achieving expected results**, to spot bottlenecks in implementation and to highlight whether there are any unintended effects (positive or negative) from an investment plan, programme or project (“project/plan”) and its activities.” (FAO, 2023)

[Monitoring and Evaluation for learning and performance improvement](#)

Don't worry, with everything going on we'll be relaxing our monitoring & evaluation standards.



What's monitoring and evaluation?

freshspectrum

Monitoring

What is monitoring?

“Monitoring is a process to periodically collect, analyse and use information to actively manage performance, maximise positive impacts and minimise the risk of adverse impacts.” (Hall, Rogers & Moore, 2022)

Don't worry, with everything going on we'll be relaxing our monitoring & evaluation standards.



What's monitoring and evaluation?

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Evaluation

What is evaluation?

“Evaluation is a systematic and intentional process of gathering and analyzing data (quantitative and qualitative), to inform learning, decision-making and action.”
(Gopal & Preskill, 2014)

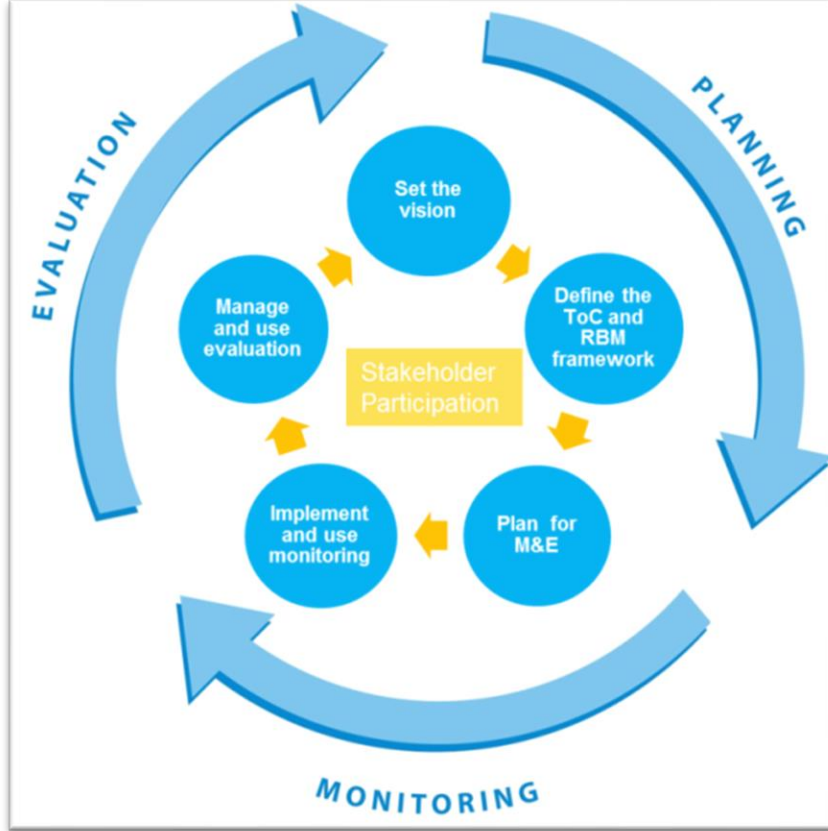
3. Identifying forms of M&E



Does your organization have an M&E function?

Why does your organisation
have M&E?

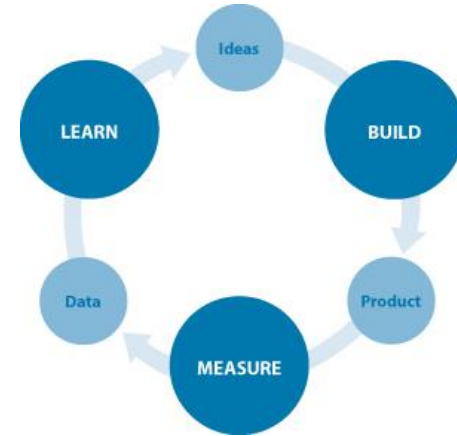
Operating cycles organisations follow



Results-based monitoring approach

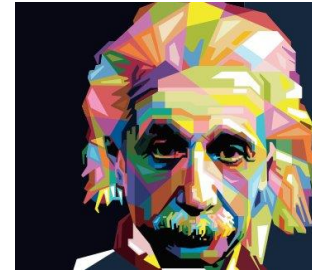
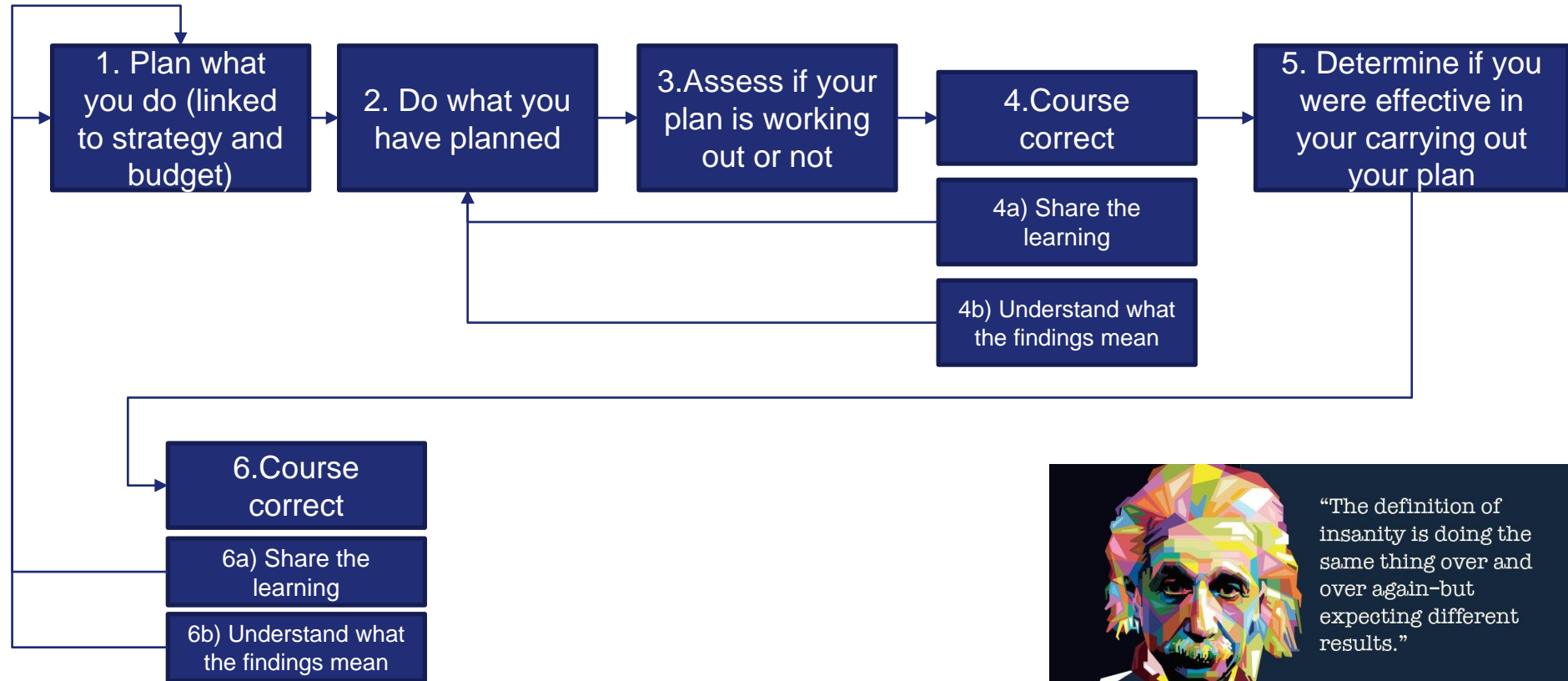


Lean cycle



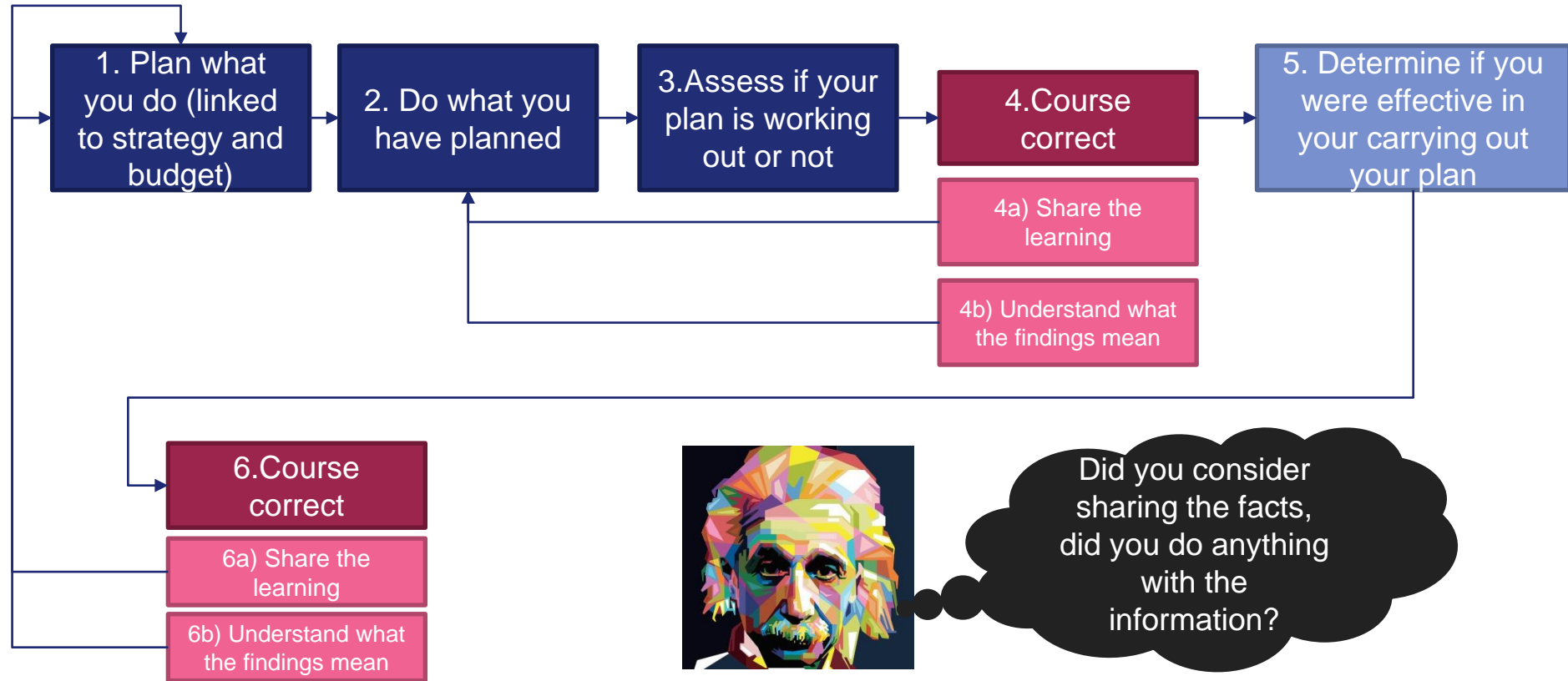
Agile cycle

In simple terms it looks like this...



“The definition of insanity is doing the same thing over and over again—but expecting different results.”

In simple terms it looks like this...



Implications...

Resourcing Risks



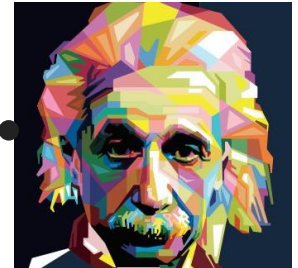
- Not having the # of right people (staff compliment)
- Not having enough financial resources
- Overcommitting (burnout)

Impact Risks



Low staff morale
Not understanding needs of participants
Not meeting targets

Imagine a road trip where you ran out of mobile data, GPS battery died, and you had no fuel?



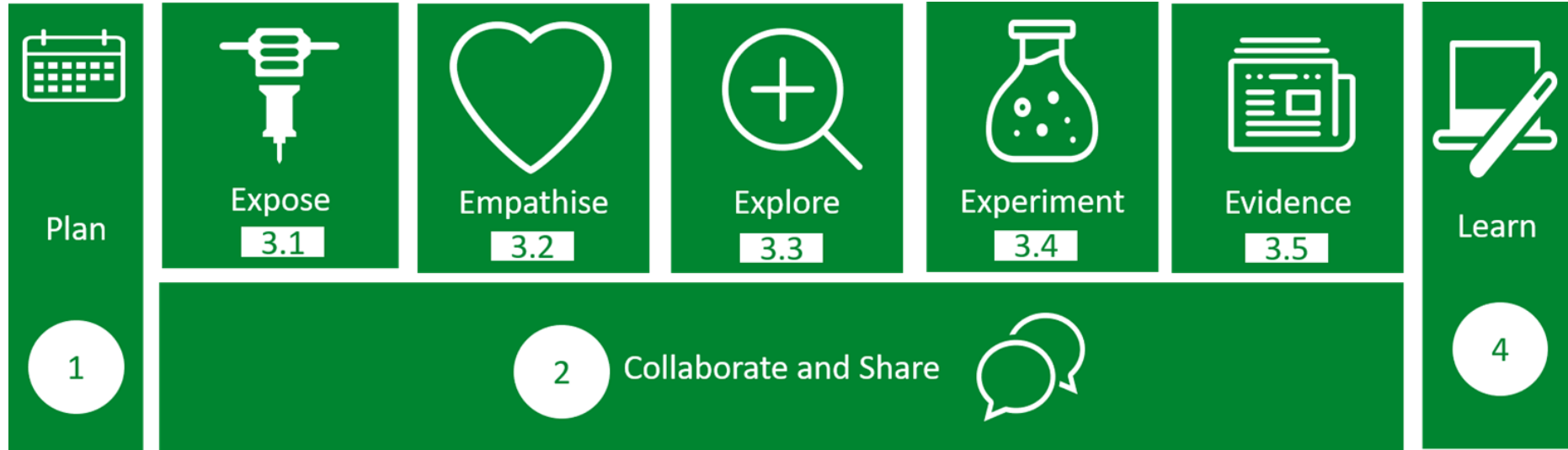


Has your organization experienced one of the risks mentioned here?

Are M&E Reports, and Research reports common knowledge in your organisation?

Does your organization use M&E data in its planning processes?

An example of the Allan Gray Orbis Foundation M&E approach



1. This approach follows the Deming Cycle of Plan-Do-Check-Act.

2. It follows lean philosophy on how to measure impact.

3. The M&E approach is also aligned to Planning, Monitoring, Evaluation, Research and Learning-which is a recursive process.


4. Phases 2 and 4 are fundamental to 3.1-3.5. This allows for greater information sharing and learning.

MONITOR, REFLECT, ACT »»» LEARNING & ACCOUNTABILITY



[World Vision's approach to M&E](#)

Function of M&E

- MEAL (Monitoring, Evaluation, Accountability and Learning)
 - **MERL (Monitoring, Evaluation, Research and Learning)**
 - MEO (Monitoring, Evaluation and Operations)
 - PMEAL (Planning, Monitoring, Evaluation, Accountability and Learning)
 - MER (Monitoring, Evaluation and Reporting)
 - **IMM (Impact Management and Measurement)**
 - New roles creeping into M&E
 - Knowledge Management, Business Intelligence, Data Visualisation Specialist, Data Scientist, Business Analyst, Impact Manager, Programme Designer, Chief Impact Officer, Behaviour Change Specialist, Impact Analyst, Impact Verification Officer
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4. What could you do to better support M&E in your organization?

Making M&E meaningful to you...

Ask questions about recent reports

Oh, we didn't really collect any data on how our participants' lives were changed. But we have loads of data about all the cool stuff we've done.



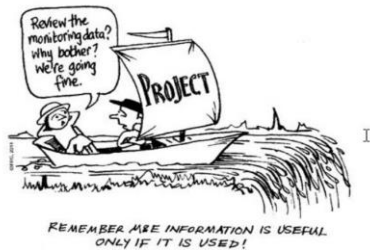
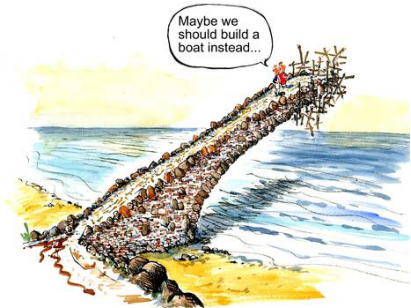
- What is the data saying, what does it mean for me
- What does it mean for the participants/communities we are meant to be serving, what does it mean in context?

Include M&E as part of your planning



- Consider the risks mentioned before
- Collaborate: opportunities may open up in terms of using the data to redesign, iterate, innovate and advocate for the problem your organization is looking to solve/fix

Include M&E as part of your Strategy



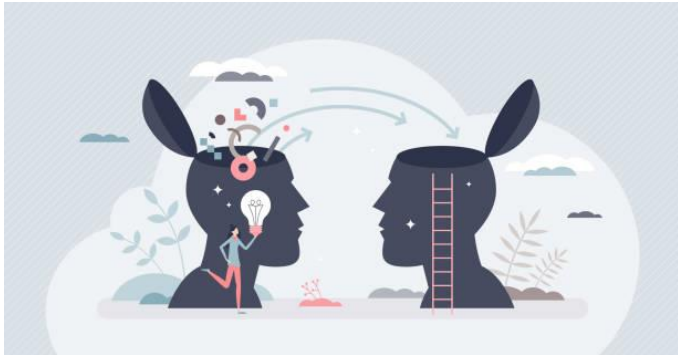
- Terms may be used differently within organisations/jargon terminology may be used in relation to M&E
- Focus on whether or not your organization is living up to its mandate/vision
- Focus on whether the problem its trying to solve is still the same
- Engage with your M&E data and look at it against your —Theory of Change

Resource the M&E function



- M&E is usually seen as a person's job (which is mostly true when the incumbent and the function is new)
- Plan for growth (i.e. the M&E processes need budget)-collecting the right data costs money, so too does evaluation and maintaining data

Share your learning



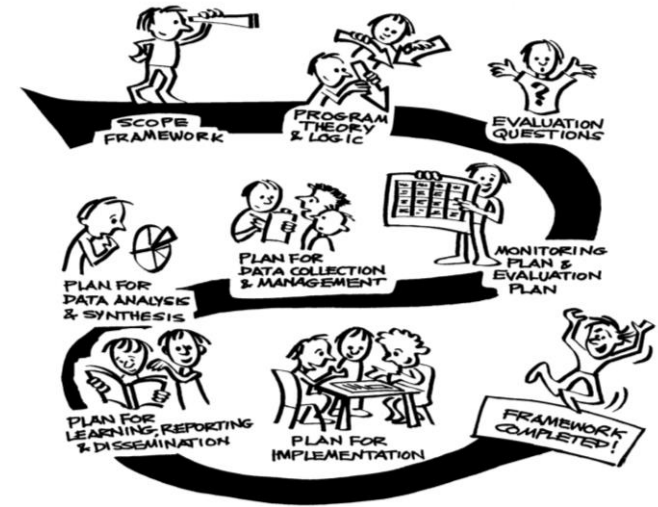
- This will encourage others to share their insights (breaking down silos)
 - It may help uncover new insights
 - It will add richness to the interpretation of data
-

5. Resources

Snippets of commonly used business tools that relate to M&E

Building M&E Capacity is a journey...so you may want to pick topics related to where you are in your journey...

- How to build M&E capacity-what was your organization's score?
- What are you currently doing to build capacity?
- M&E Terminology
- Evaluative Thinking
- Theory of Change
- M&E systems
- M&E staffing
- M&E Planning
- M&E Frameworks



Assessment of your organisation's capacity

- American Evaluation Association. <https://aea365.org/blog/>
- BetterEvaluation. <https://www.betterevaluation.org/>
- Bourgeois, I. & Cousins, J.B. (2013). Understanding dimensions of organisational evaluation capacity. *American Journal of Evaluation*, 34, 3, pp. 299-319. [attached]
- [Catholic Relief Services SMILER Guide Propack III](#) (check against what is in the manual)
- MERL Center. <https://merlcenter.org/>
- Measure Evaluation: <https://www.measureevaluation.org/pima/m-e-capacity>
- ROLE Survey (use to determine what is in place) (attached)
- South African Monitoring and Evaluation Association <https://www.samea.org.za/read>



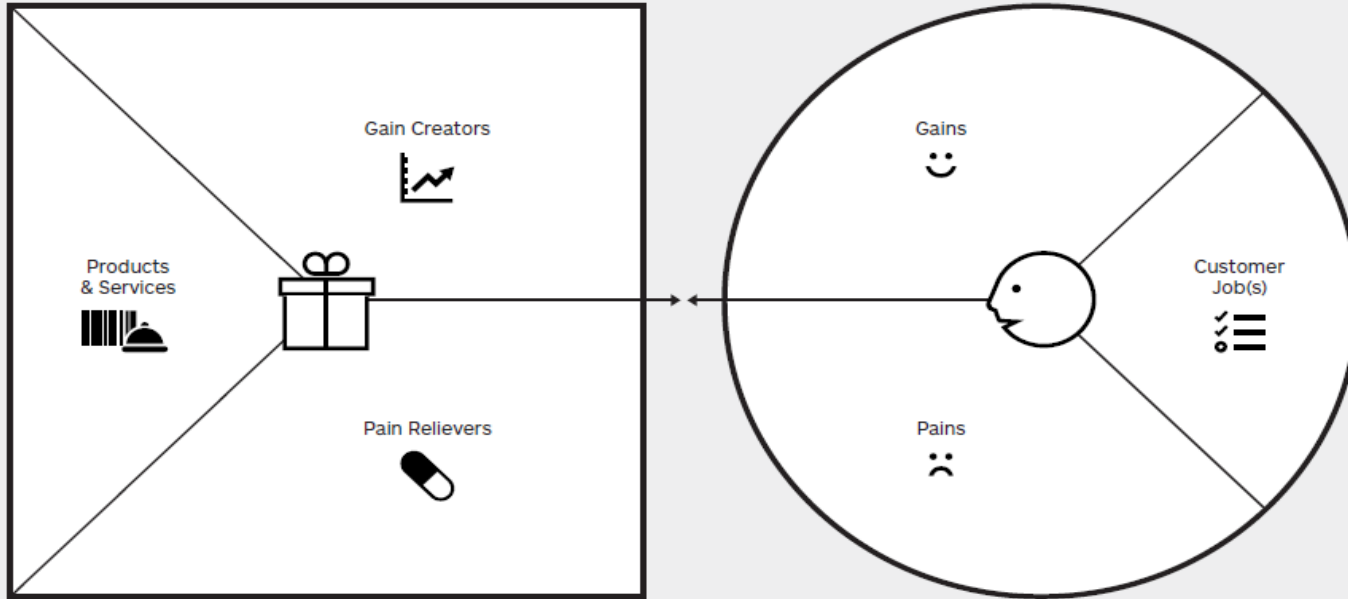
Courses

- Philanthropy University (5 Free M&E Courses):
https://courses.philanthropyu.org/courses?show_all=true
 - Acumen+ (Some are free): <https://acumenacademy.org/courseCatalog/>
 - EdX (courses on Impact Evaluation):
<https://www.edx.org/search?q=Evaluation&tab=course>
 - Coursera (search Program Evaluation or Impact Measurement/Management):
<https://www.coursera.org/search?query=Program%20Evaluation>
 - UCT, WITS Business School, Stellenbosch University all offer formal degrees in M&E (paid)
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The Value Proposition Canvas

Value Proposition

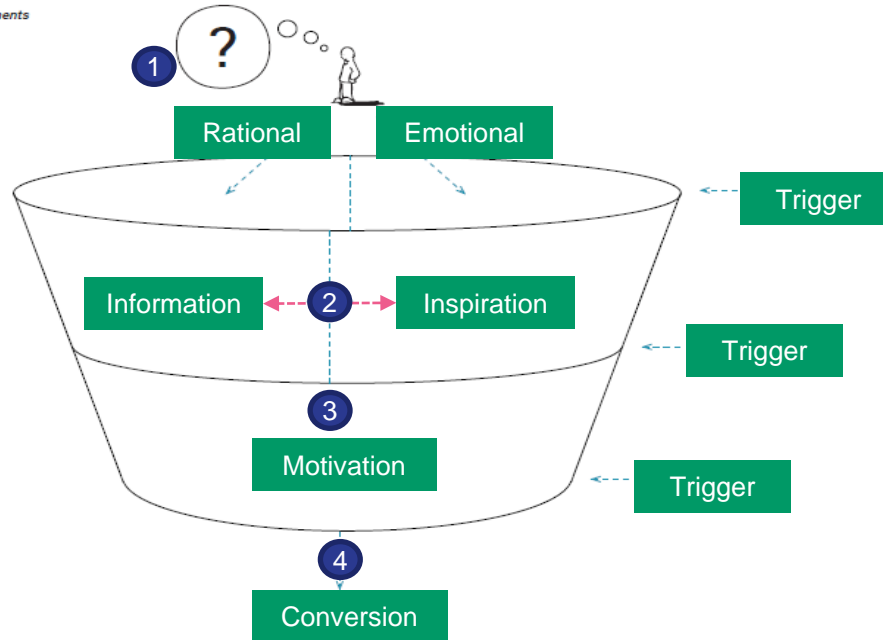
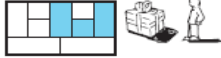
Customer Segment



- Provides a simplified view of a customers needs.
- Useful for Programme Designers.
- Provides some direction into understanding the needs of customers and how they are best served.



Value Proposition > Customer Segments



- Provides insight into the emotions, rational thinking and motivation of customers.
- Useful for Programme Implementation Staff and Senior Leadership team.
- Useful when designing a programme, or collecting data to better understand the fit between programme theory and programme delivery.










The Business Model Canvas

Designed for:

Designed by:

Date:

Version:

Key Partners  Who will you work with?	Key Activities  What will you do?	Value Propositions  What is your product/service?	Customer Relationships  How do you interact with your customer?	Customer Segments  Who is your customer?
	Key Resources  What do you need to deliver your product/service?		Channels  How will you communicate and distribute your product/service?	
Cost Structure  What are the costs associated with delivering your product?			Revenue Streams  How will you make money off your product/service?	

- Provides an overall picture of how a business operates
- Useful for all stakeholders involved with programme delivery.
- Mainly those in a Marketing, Fundraising, Operations, Finance and Senior Leadership role.
- Useful when developing/
- reviewing strategy

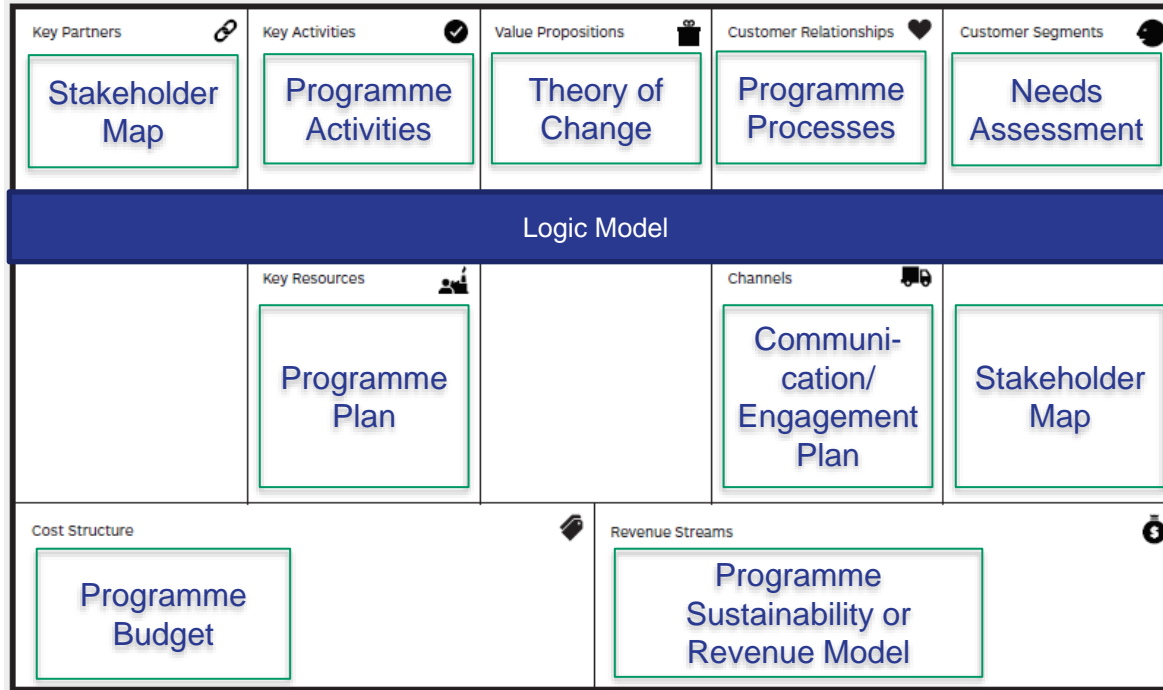
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Business Model Canvas also integrates various aspects of Monitoring and Evaluation that may be challenging to explain for stakeholders involved in implementing a programme and for those Evaluating a programme.