DATA USE

Monitoring and evaluation (M&E) information can be used in many ways. The three most common are learning, accountability and project or programme management. It is important to be clear from the start of a project or programme who needs to use M&E information, when and how. Engaging with potential users at an early opportunity increases the likelihood that M&E information will be used later on.

Monitoring and evaluation (M&E) is not an end in itself. No matter how well information is selected, collected, analysed and communicated it will make no difference to a project or programme unless it is used properly. It is therefore important to plan for data use right from the start of a development intervention.

Unfortunately, many CSOs have tended in the past to design M&E systems (or evaluations) without properly considering how to use the information afterwards. This is the wrong way around. Rick Davies (1996) refers to the fate of many M&E systems, which involve a large amount of effort and interest setting them up, lesser concern for data generation and analysis, and even less interest in actually using the information. To avoid this fate, CSOs need to be very clear about:

- who needs to use M&E information;
- what they need to use it for;
- when they need to use it; and
- how they intend to use it.

This means engaging with potential users at the earliest possible opportunity to properly assess their requirements and increase the likelihood of M&E information being used later on.

Factors influencing the use of M&E information

Many different factors influence how M&E information is used. Some of these are described below.

- Different organisations and stakeholders use M&E in different ways, depending on their place within the aid chain. For example, donors and host governments often use M&E information to hold CSOs accountable for results or ensure that regulations and legislation is properly complied with. Large CSOs may use M&E information to attract profile and funds, or to learn across different programmes. Operational partners or field staff may use M&E information to manage projects and programmes. And beneficiaries may use M&E information to better understand their own circumstances and take ownership over work that affects them.
- M&E information can also be used differently at different levels of a CSO. For example, at project level, M&E information is almost always used for project management and may also be used for accountability towards beneficiaries. At programme or sector level M&E information may be used to enhance communication between different stakeholders or provide evidence for advocacy work. At head office level in large NGOs, M&E is often used for fundraising and marketing, or accountability to donors and funders. Ideally, M&E information should be used for learning and improving at all levels of a CSO.
- M&E usage often depends on the type of work being carried out. If a CSO is engaged in service delivery, using tried and tested methods, M&E is more likely to be used for project management to ensure that projects remain on track. CSOs experimenting with new or innovative programmes are likely to devote a lot more resources to learning in order to improve the programmes and, eventually, expand or replicate them.
- The type of M&E carried out clearly also has a significant influence on usage. Routine monitoring information is often used for project management, whereas reviews, evaluations and impact assessments may be more focused on accountability and learning.

Small CSOs may operate M&E systems for one or two purposes only. But larger CSOs may operate M&E systems which are used in various ways at different levels of the organisation. This makes it even more important to fully understand how different stakeholders intend to use M&E information before planning and designing a system or approach.

Learning, accountability and project management

The three most commonly cited uses of M&E information are project or programme management; learning and improving; and accountability.

Project or programme management: M&E information is routinely used by CSO staff at field level to manage projects and programmes on an ongoing basis. This includes tracking resources, ensuring they are used properly, addressing problems as they occur, taking advantage of opportunities, and ensuring that projects and programmes are managed in the best way possible. Many CSO staff

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spend a huge amount of time monitoring activities, deliverables, budgets, finances, procurements, contracts, compliance, relationships, logistics, equipment, personnel, risks and actions, as well as the external environment. This kind of monitoring is often ignored within academic debates on the use of M&E information, but is actually where ninety per cent of M&E activity takes place.

At the other end of the scale there is an ongoing debate around the contribution of M&E to the management of large, complex programmes of work. This is known as adaptive programming or adaptive management. Adaptive management involves regular processes for the collection and analysis of information, which is then used to make changes to a programme throughout its lifetime. Adaptive management is heavily dependent on having good learning processes and systems within a programme.

Learning and improving: There is a large degree of overlap between M&E and learning. M&E can contribute to learning in many ways. This includes generating new learning, highlighting the need to investigate an issue in further depth, capturing and communicating learning generated through informal processes, and supporting processes designed to jointly make sense of existing information (sensemaking).

Many M&E systems or evaluation approaches also include mechanisms to ensure that the learning generated through M&E processes is then translated into decision-making. This enables M&E information to contribute directly to improved performance within a project or programme.

Accountability: One of the most important reasons for carrying out M&E is to be accountable to different stakeholders. Accountability means different things in different circumstances depending on who is accountable, to whom, and for what. Broadly, there are four types of accountability for CSOs (see Hayman 2013). M&E information is routinely used to support all four types.

- Upwards accountability normally means the accountability of a CSO to its public or private donors. It can also include accountability to host governments or regulatory bodies.
- Downwards accountability usually means the accountability of a CSO to its beneficiaries, to any partners it funds or supports, or to other stakeholders that might be affected by its work.
- CSOs can also demonstrate sideways or horizontal accountability. This means being accountable to sister organisations working in coalitions, partnerships or networks.
- CSOs may also demonstrate self accountability. For example, small CSOs that represent the needs of their memberships may be accountable to those members. Staff working in a CSO might need to be accountable to managers. And CSOs are often accountable to boards, trustees or steering committees.

CSOs can be held accountable for many different things. This includes compliance with rules or standards, finances, processes, activities, deliverables and medium- to long-term changes.

Other uses of M&E information

In addition to project or programme management, learning and accountability, there are also several other common ways to use M&E information. Some of these are described briefly below.

- ***Supervision and control:*** Information collected for project management purposes may be used to enable managers to supervise and control project staff, or CSOs to supervise and control projects run by operating partners. Donors and host governments also use reports generated through M&E to supervise recipients of aid money.
- ***Resource allocation:*** Project management information may be used for resource allocation. This means using M&E information to help decide how and where resources should be allocated. An extreme version of this is called Payment by Results. This is where payments to CSOs are conditional on the achievement of predicted results.
- ***Policy influencing:*** CSOs involved in advocacy or policy influencing often use information collected through M&E processes to provide evidence that supports their efforts (or the efforts of others) to change or oppose government policies. Information acquired through M&E processes may also be used to held build a critical mass of support around an issue.
- ***Communication:*** M&E information is sometimes communicated to specific stakeholders to achieve a defined purpose. But the communication of M&E information can also be an end in itself. It can help increase understanding between different stakeholders by helping them to appreciate each other's perspectives.
- ***Marketing and fundraising:*** Many CSOs seek to raise funds from individuals or commercial organisations, or solicit their support in other ways such as volunteering, taking part in campaigns or attending events. M&E information is often used to support these efforts.
- ***Enhancing participation:*** M&E can also have value as a process, particularly where CSOs operate participatory M&E systems. Done well, these can enable different stakeholders to increase their participation within a project or programme. Sometimes, M&E systems or evaluations incorporate special processes through which beneficiaries can increase their involvement in a project or programme. These include complaints mechanisms and beneficiary feedback mechanisms.

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Further reading and resources

Many of the different ways of using M&E information mentioned in this paper are covered in separate papers within this section the M&E Universe. These include papers on learning, accountability, project and programme management, adaptive management, communication and fundraising and marketing. There are also separate papers on reporting and learning-based M&E systems.

- Learning
- Accountability
- Project and programme management
- Adaptive management
- Communication
- Fundraising and marketing
- Reporting
- Learning-based M&E systems

References

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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.

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