REVIEWS

A review can be defined as an assessment of the performance of an intervention, periodically or on an ad-hoc basis. However it is a very imprecise term that can have different meanings in different circumstances. A review can be formal or informal, broad or narrow, internal or external, or any combination of these. Many CSOs operate systems of self-reviews that can enhance monitoring processes.

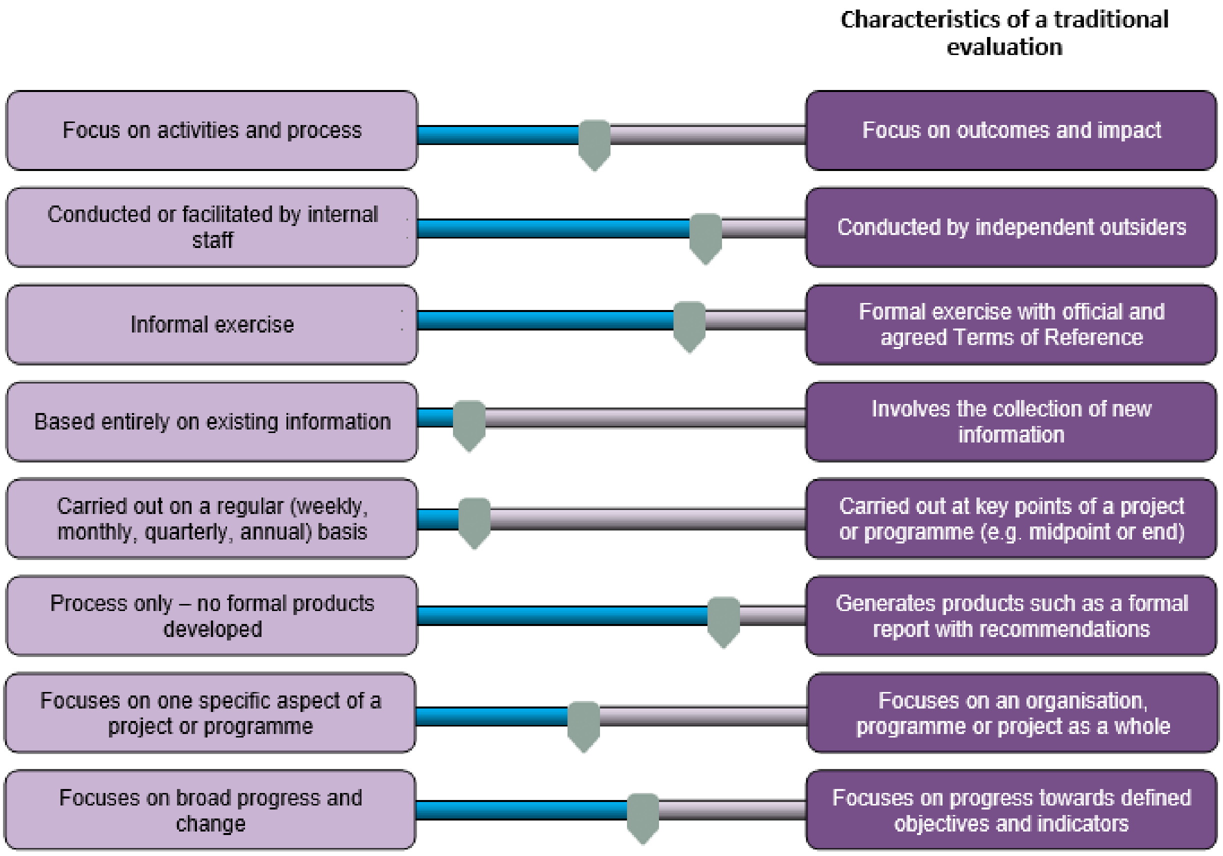
The OECD definition of a review is *"an assessment of the performance of an intervention, periodically or on an ad-hoc basis"* (OECD 2010). However, it is a very imprecise term that can have different meanings in different circumstances. Most people use the term to refer to an exercise that is a bit more than ongoing monitoring, but a bit less than evaluation. A review can be regular or ad-hoc, formal or informal, broad or narrow, internal or external, or any combination of these.

The diagram below shows how a review may vary across many dimensions. Indeed, in some circumstances there is little or no difference between a formal evaluation and a review. For example, many large projects and programmes commission a major review of progress at the mid-point. Sometimes this is known as a mid-term review and sometimes as a mid-term evaluation.

A review can focus on any level of an intervention. It can focus on an organisation, region, country, sector, strategy, working approach, programme or project. It can also focus on specific aspects of a programme or project. A review is normally conducted after work on a development intervention has begun, but it may be carried out before objectives have been defined. A participatory review may involve many different stakeholders. However, some reviews are confined to a few internal staff members.

A review has many different potential purposes. In general, a review is more likely than an evaluation to focus on internal learning and project / programme management. But reviews may also be carried out for accountability purposes, or for any other purpose usually associated with monitoring and evaluation.

In the diagram below, the right-hand boxes represent the characteristics of a traditional evaluation against different dimensions. In each of the different dimensions, a review can lie anywhere between the two extremes, as denoted by the 'sliders'.

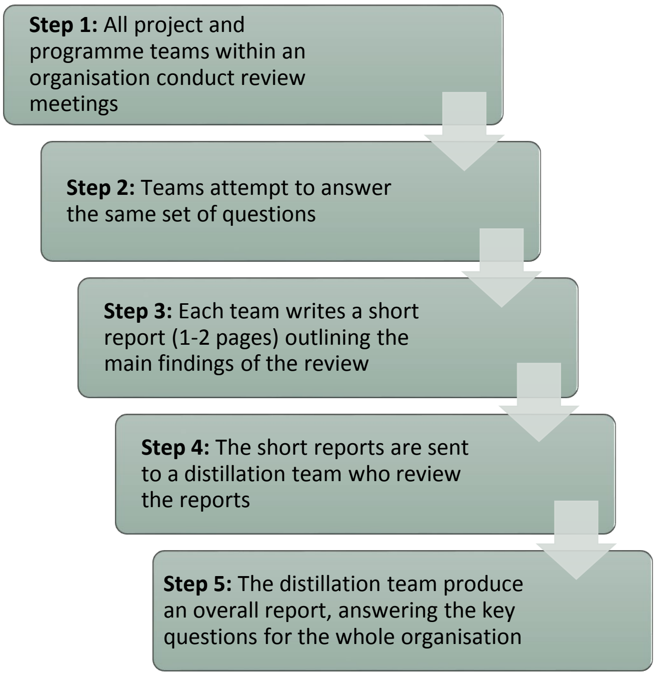


Self-reviews for CSOs

Many CSOs operate systems of self-reviews that can enhance monitoring processes. Internal staff always participate within these reviews, and sometimes other stakeholders, such as beneficiaries, are invited. The reviews may be facilitated by external or internal staff.

The reviews are conducted at regular intervals, such as quarterly, six-monthly or annually. The idea is to ensure that all staff are regularly thinking about their work, its purpose, and how it is affecting others, rather than being fixated on the activities they are carrying out, and whether or not they are meeting their targets.

There are many ways of organising and conducting self-reviews. The methodology outlined below is an illustration only. However, it is one that INTRAC has found useful in the past when working with many different kinds of CSOs from small community-based organisations through to large, International NGOs.



The first step involves working out who should conduct reviews. In many cases this will be the project and programme teams. If an organisation operates in more than one country then reviews could be carried out in different countries as well. Reviews might also be carried out by finance and administrative teams, or teams having specific responsibilities such as monitoring and evaluation (M&E) or advocacy.

In preparation for the review meetings, members of the different teams are expected to read or re-read any relevant documents related to their areas of responsibility that have been produced since the last review. This can include project reports, field visit reports, beneficiary surveys, training evaluation forms, workplans, or any other relevant report.

Reviews are then facilitated around a set of key questions – usually no more than three or four. The facilitator may be someone from within the team, a member of another team, or an outside facilitator. Their task is to help the team answer a set of core questions. Some of the questions commonly used are as follows.

- Are we doing what we said we'd do, and are we doing it well?
- Are we making any difference? If so, what?
- What are the key changes that we have contributed to in the period since the last review? What made them happen?
- Are we still doing the right things? What else might we be doing instead?
- What work has gone particularly well or badly?
- What challenges have there been? Were they overcome? If so, how? If not, why not?
- What might we have done differently with the benefit of hindsight?
- What advice would we give to someone else planning to carry out similar work in similar circumstances?

The same questions can be asked in every review, or a different set of questions can be asked each time a set of reviews is conducted.

The tangible output of the process is a mini-report of about 1-2 pages. This mini-report should capture the answers to the main questions. The conclusion to the mini-report should identify the main learning points to emerge from the review, together with a set of recommendations for the future. An example of where this system has been used in the past is shown in the box below.

Case study: Learning reviews in Concern Ethiopia

In the mid-2000s, Concern Ethiopia was implementing several different programmes and projects in different sectors and locations. Each had its own formal M&E system, and each required the generation of regular accountability reports to different governments and donors. Since the nature and extent of all this formal reporting was considered to be inconsistent with learning principles, a system of learning reviews was developed. All programmes and projects were allocated time for a periodic, facilitated learning review. This review built on information collected through formal M&E processes, but also built on the knowledge and experience of Concern (and sometimes partner) staff.

Following each review, a short, bullet-point report was produced and shared. The report did not form any part of Concern's formal accountability mechanisms within Ethiopia. The purpose of the reviews was expressly to generate new learning, and share existing learning in order to improve the performance of existing and future projects and programmes. The reviews formed their own separate part of Concern Ethiopia's M&E system, and operated in parallel with more formal processes.

Once all the different teams have produced reports, these are sent to a distillation team. This is a group of two or three people whose job is to compare and synthesise all the different reports. The distillation team should be comprised of people who are trusted in the organisation. The job of the distillation team is to produce one overall report that answers the key review questions for the entire organisation. This document is then shared back with all the different teams.

CSOs experimenting with this kind of review system often find it quite difficult at first. They may need to carry out one or two rounds of reviews, making adjustments after each round, before staff are happy with how the system works. But once it has been embedded into the organisational culture it can be a very powerful tool for enhancing organisational learning and decision-making.

Further reading and resources

This section of the M&E Universe contains papers on monitoring, evaluations, impact assessment, and research.

Monitoring

Evaluation

Impact assessment

Research

References

- OECD (2010). *Glossary of Key Terms in Evaluations and Results Based Management.* OECD, 2002, re-printed in 2010.

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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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