

PLANNING AND M&E

Good monitoring and evaluation (M&E) often depends on good planning. If plans are properly developed at the start of a project or programme then monitoring and evaluation become much easier tasks. In contrast, it can be difficult to monitor and evaluate a project or programme that was not properly planned at the beginning. Planning and M&E should be closely linked throughout a project or programme.

Before implementing a project or programme there is normally a design and planning process. This should be based on a thorough understanding of what the project or programme is setting out to accomplish. At the very least, a project or programme plan should clarify:

- what activities will be carried out;
- what it is hoped will change as a result; and
- why those changes are important.

Wherever possible, it is important to consider monitoring and evaluation at the planning stage, rather than waiting until after plans have begun to be implemented. Failures in project or programme M&E are often due to the fact that M&E was not considered early enough.



Monitoring is the continuous collection and analysis of information about the progress of a development intervention. An **Evaluation** is normally carried out at the mid-point or at the end.

There are several reasons for addressing M&E at an early stage (see box opposite). First, objectives are often better defined and more realistic when designed with M&E in mind. This is because people know they will have to find out whether they have been achieved later on. Second, in order to identify change it may be important to know what the situation was at the beginning of a project or programme. This means data needs to be collected right at the start. Third, designing an M&E process early on can help to identify gaps or weaknesses in the planning process. This can lead to the development of improved plans. Fourth, if different stakeholders are intended to be involved within M&E processes then it is also important to ensure they are involved at the planning stage of a project or programme. Decisions on who should be involved in M&E therefore need to be made earlier rather than later.

This does not mean that M&E should only ever rely on measuring pre-defined objectives. On the contrary, most good M&E systems are designed to capture unintended changes as well as intended ones, and therefore need to be flexible enough to identify and record changes and activities that emerge during a project or programme.

It is still possible to carry out effective M&E on a project or programme, even if M&E was not properly considered at

Reasons for considering M&E at an early stage

- Objectives are better defined and are often more realistic when designed with M&E in mind
- Data sometimes needs to be collected at the start of a project or programme to make comparisons later
- Addressing M&E early on may help identify gaps or weaknesses in the planning process
- Stakeholders involved in M&E should also be involved during planning

the planning stage. Indeed, some M&E tools and techniques are specifically designed to do this. However, it is harder and there may be fewer options. In the worst cases, it may only be possible to list activities carried out and changes observed, with no real idea of how they compare to what was considered realistic at the start of the project or programme.

Linking planning and M&E

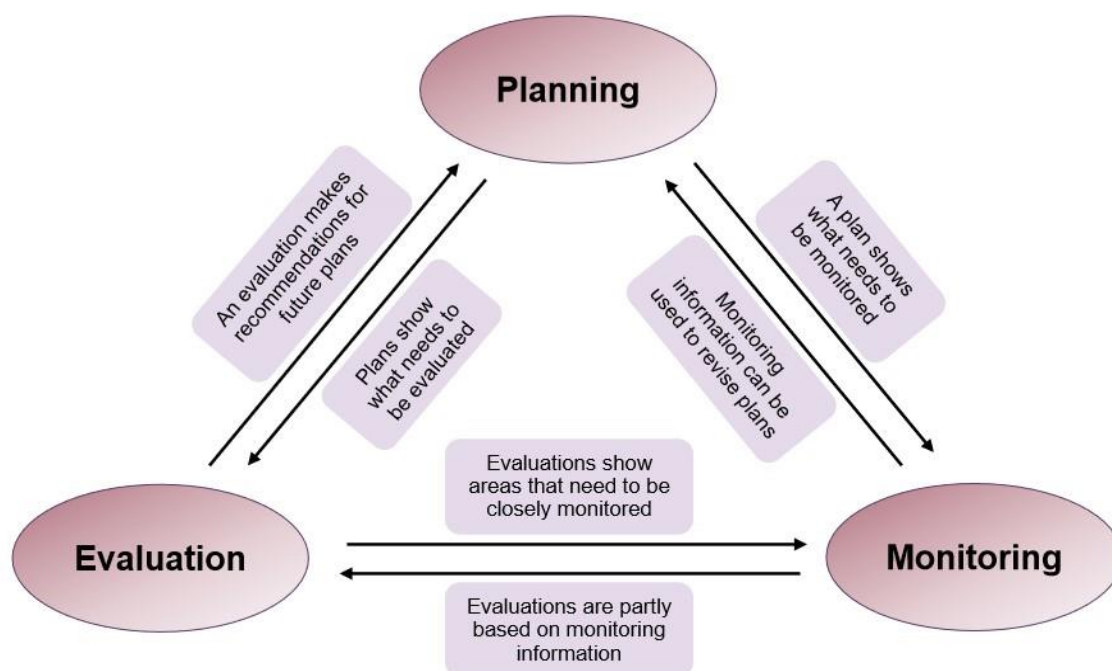
Even after a project or programme has begun it is still important that planning, monitoring and evaluation are closely linked and are not viewed in isolation (Bakewell, Adams and Pratt, 2003). This is shown in figure 1 on the following page.

Working clockwise, a plan shows what needs to be monitored. The monitoring information gathered throughout a project or programme may then be used during an evaluation. In turn, an evaluation may lead to the revision of plans – either in a new phase of the project or programme, or in future projects or programmes.

Working anti-clockwise, a plan identifies what needs to be evaluated, and an evaluation might recommend areas that need close monitoring in the future. Monitoring also plays an essential role in identifying how plans should be revised throughout the lifetime of a project or programme.

INTRAC believes that the different functions of planning, monitoring and evaluation should be fully integrated, each in turn affecting – and being affected by – the other functions. This is why organisations are often encouraged to think of a PME (planning, monitoring and evaluation) system rather than just an M&E system.

Figure 1: Links Between Planning, Monitoring and Evaluation



Source: Adapted from Bakewell, Adams and Pratt (2003, p14)

Further reading and resources

The **Planning and M&E** section is central to INTRAC's M&E Universe. The next four papers cover the development of plans, influences that affect the design of an M&E approach, the development of an M&E approach, and M&E plans. These papers can be accessed by clicking on the links below.



References

Bakewell, O.; J. Adams and B. Pratt. (2003). *Sharpening the Development Process: A practical guide to monitoring and evaluation*. INTRAC, Oxford, UK.

Author(s): INTRAC

INTRAC is a values-based, not-for-profit organisation with a mission to strengthen civil society organisations. Since 1991, INTRAC has contributed significantly to the body of knowledge on monitoring and evaluation. Our approach to M&E is practical and founded on core principles. We encourage appropriate M&E, based on understanding what works in different contexts, and we work with people to develop their own M&E approaches and tools, based on their needs.

M&E Training & Consultancy

INTRAC's team of M&E specialists offer consultancy and training in all aspects of M&E, from core skills development through to the design of complex M&E systems

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M&E Universe

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