

**PMME** UCDG Programme Management,  
Monitoring and Evaluation Office

# MONITORING AND EVALUATION POLICY IN THE PUBLIC SECTOR.



Written by  
Zikhona Mkosana

Editor

Sanele Thwala

# INTRODUCTION

It has become common practice for Monitoring and evaluation (M&E) to be required for the continuous assessment of projects or services being provided by organisations, institutions, and companies nationally and internationally. M&E can help improve a project's performance and ensure the achievement of positive or desired results. M&E also plays an important role in measuring and assessing the end-performance of a particular project or service to better manage project outcomes. This policy brief will look at the use of M&E in the public sector.





# ORIGINS OF MONITORING & EVALUATION



There is a continuous need for the development of all countries, therefore government structures have to ensure that developmental project plans are implemented and are successfully changing the quality of life of citizens. To achieve these goals a need emerged for a system that can assist in achieving these mandates on time and measure the effectiveness of developmental projects. There is a continuous need for the development of all countries, therefore government structures have to ensure that developmental project plans are implemented and are successfully changing the quality of life of citizens. To achieve these goals a need emerged for a system that can assist in achieving these mandates on time and measure the effectiveness of developmental projects.

## MONITORING

Monitoring is a continuous assessment of the project based on measuring the progress of the planned project which has been derived from the initial problem description. Monitoring comes into place to keep track of the implementation of the ongoing project. This process is vital to alert all stakeholders ahead of time regarding the progress or delay of an ongoing project. The goal is to determine if the planned indicators, through their targets, and schedules are met so that mitigation can be affected as soon as possible.

### The common types of monitoring in programme

Various types of monitoring can take place in a programme or project. Below we discuss some of the common instances.

# IMPACT MONITORING



Impact monitoring tracks results and impacts. Here, we combine monitoring and evaluation to determine if a project is achieving the intended results and if there are any unintended impacts (positive or negative). For example, a public mental health project can monitor community activity and produce results that contribute to community resilience and disaster resilience

# PROJECT MONITORING

Project monitoring keeps track of the allocated resources usage, the progress, and the final project delivery. It can find out how the activity is performed, that is, efficiency in terms of time and resources. It is often performed in combination with compliance monitoring and reflected in impact assessments. For example, skills projects in higher education can monitor targeted students and staff members for timely access to training. Skills program projects can again monitor that shelters or centre are being built to agreed national and international safety standards.





# CONTEXT MONITORING



Context monitoring depends on the environment in which the project or the programme that is running. This not only affects the identified risks and assumptions, but also the unexpected considerations that may arise. It covers both the subject and the larger political, institutional, financial and contexts that affect the project or programme. For example, a project in a gang-prone area could not only hinder the success of the project, but also monitor potential violent incidents that could endanger the project's staff and volunteers

# BENEFICIARY MONITORING



Beneficiary monitoring tracks the perceptions of beneficiaries of a project or programme. It covers beneficiary satisfaction or dissatisfaction with the project or programme, including their participation, treatment, access to resources, and their experience of overall change. Sometimes referred to as Beneficiary Contact Monitoring (BCM), it often includes a mechanism for stakeholder complaints and feedback. It is important to consider the perceptions of different population groups and indirect beneficiaries (such as community members who do not receive goods or services directly)

An example can be a cash payment program that supports community members after a natural disaster, with feedback on how community members feel about programme participant selection, participant payments, and the contribution the programme is making to the community



## FINANCIAL MONITORING



Financial monitoring considers costs for each input and activity within the predefined expense categories. This is often combined with compliance and process monitoring. For example, a livelihood project that runs a large number of micro enterprises can monitor grants and repayments to ensure that implementation is on time within budget.

## ORGANISATIONAL OVERSIGHT



Organisational oversight monitors projects and its partners' support potential, institutional development, and capacity building. This can be done in combination with the monitoring process of a large management organisation to ensure project implementation.

There are various tools and steps followed in processes based on monitoring needs, but there are some best practices summarised below.

- Monitoring data should be properly targeted to specific audiences and uses,
- Monitoring should be systematic and based on pre-determined indicators and assumptions,
- Monitoring should look for unexpected changes in the project and its context, such as changes in project prerequisites. This information should be used to coordinate the project's implementation plan, and
- Monitoring should be timely so that information can be used to easily inform the implementation of a project.

The above-mentioned monitoring types all try to achieve the same goal in various aspects. The findings of the measurement, after collecting all the data from the project indicators, help make decisions to see if changes should be made to implementation.

## EVALUATION DESCRIPTION

Evaluation is a tool that is used after a project is completed, however in some cases when a certain phase in a project has been reached the team can also evaluate. The goal is to avoid repeating the same mistakes and finding ways to improve a project. The team can use various evaluation tools such as data compilation. The evaluation findings can be transformed into information that can assist the team to make strategic decisions to improve future projects or activities. The team can achieve this through analysis of the projected and actual results of the project.

The team can also use information from previous monitoring processes to understand how a project or programme has evolved and stimulated change to avoid redundancy. Ultimately there are about 4 aspects the team can draw conclusions on:

1

**Applicability**

3

**Effectiveness**

2

**Usefulness**

4

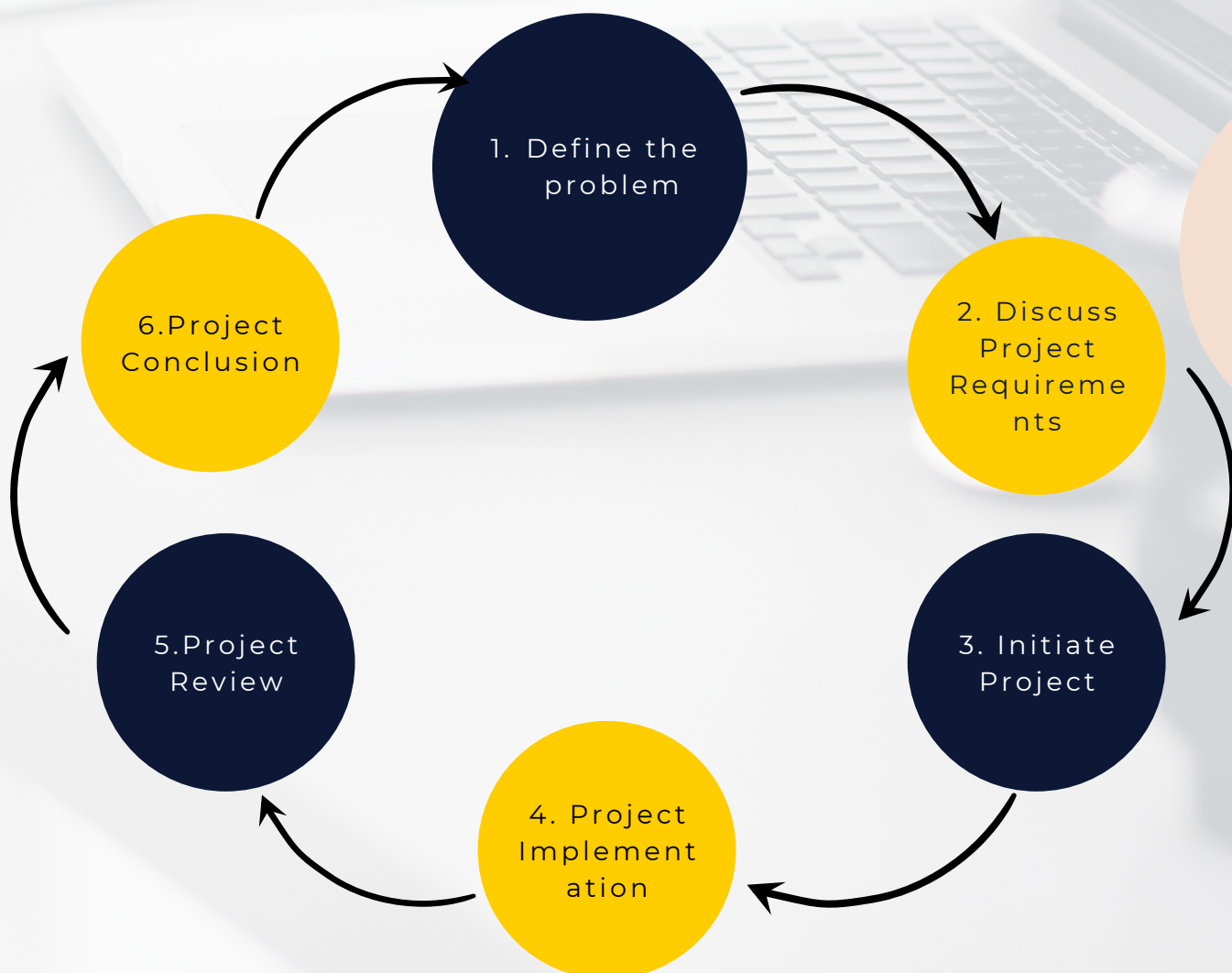
**Impact**



## WHY MONITORING AND EVALUATION IS IMPORTANT

The overall purpose of M&E is to measure and assess performance to better manage the results. M&E is very important as it clarifies errors early and provides learning and improvement paths. It also provides the basis for implementing previous M&E analysis results on a current project and testing assumptions. M&E is beneficial to the government entities as it avoids the wastes of public resources as each step of a project will be thoroughly monitored to find any blind spots on time. The figure below shows an example of an M&E process.

### OVERVIEW OF MONITORING AND EVALUATION PROCESS:



## PLANNING STAGE

### Step 1: Define the problem

- Thoroughly analyse the problem, and
- Conclude on a diagnosis.

### Step 2: Discuss project requirements:

- Identify the goal (solution) to the problem,
- Discuss projected constraints and challenges to achieve the goal,
- Appoint team and specify roles, and
- Finalise any equipment that will be needed.

### Monitoring and Evaluation stage:

### Step 3: Initiate the project

- Create a project timeline which includes indicators (checklist) to keep track of the project, and
- Finalise the budget by discussing projected expenses.

### Step 4: Project implementation.

- Referring to project timeline checklist.

### Steps 5: Project review

- Discuss any possible adjustments that need to make.

### Step 6: Project conclusion

- Do a performance analysis, and
- Create recommendations for the following project.



## CONCLUSION

A successful M&E system can be achieved through having clear strategies, establishing strong hierarchical managerial processes, sufficient documentation guides and reporting standards. A successful M&E system will result in relevant structures, responsive public services, higher quality services, and significant improvements in the quality of life for all beneficiaries. However, what is missing in both South Africa currently is an example of a government-wide Monitoring and Evaluation System (GWMES). GWMES is a management system that enforces an integrated system for all documentation and reporting which can be performed through various tools for example Information Systems tools. The development of M&E systems can evolve rather than follow a complete and detailed blueprint. The main objectives of today's monitoring and evaluation is to develop the organisation and ensure accountability and success through a thorough follow up process, leading to the implementation of a GWMES