

The image shows the interior of a modern church, likely the Church of the Holy Spirit in Gdańsk. The architecture is characterized by its extensive use of light-colored wood. The walls and ceiling are composed of numerous vertical wooden slats that curve upwards to form a large, pointed arch. A bright, large window at the far end of the nave allows natural light to flood the space, creating a strong contrast with the interior. The floor is also made of wood. In the foreground, there are rows of wooden pews. To the left, a black grand piano is positioned near a white, abstract sculpture. To the right, there are more abstract sculptures, including a large, dark, curved one. The overall atmosphere is serene and minimalist.

# Monitoring and reporting – why to bother at all?

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PROGRESS CHANGE  
ADVANCEMENT  
QUALITY LIFE  
GROWTH FUTURE  
FORWARD  
ACHIVEMENT  
IMPROVEMENTS

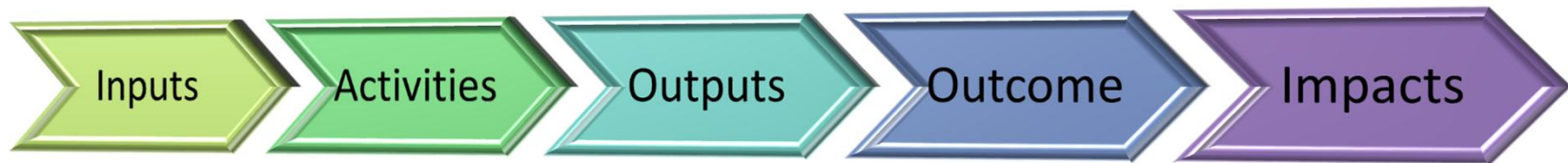
# Start with key concepts & definitions

Concept	Definition	Example
Aims (desired impacts)	The final impacts on peoples' lives or the environment that you wish to achieve	To reduce our individual and community carbon emissions & contribution to climate change; to contribute to a fairer, more prosperous and sustainable community; to improve well-being
Objectives (desired outcomes)	The changes you need to make so that you achieve your aims (desired impacts)	To increase personal agency; to encourage more sustainable living/behaviours; to increase community resilience/capacity to withstand external shocks; supportive and fair government policies
Outputs	The immediate and direct result of your activities that contribute to your objectives (desired outcomes)	To engage X participants in projects/ events/training from y and z demographic groups; to plant X trees, to facilitate swapping of Y items at a Bring & Take event
Activities	The programme & project activities and processes you undertake so that you achieve your desired outputs	Community engagement & awareness raising; action/learning groups on household energy use & lifestyles; community food, transport, waste reduction projects
Inputs	The key human, financial, technical, organisational and/or social resources that you need to undertake your activities	Volunteer capacity and availability; access to IT and other online resources; fund raised and available

# Pathway to change

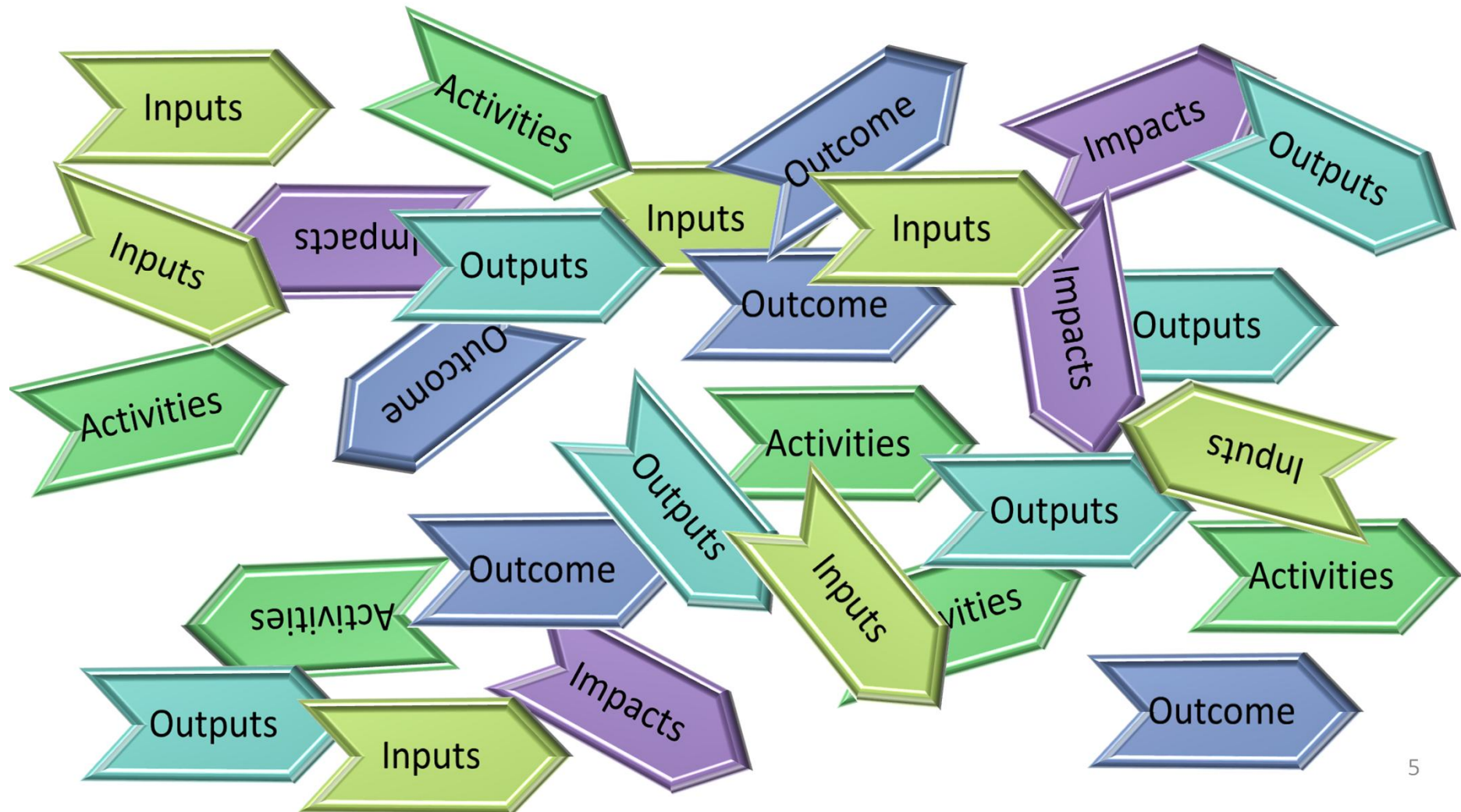
how your activities will contribute to your desired outcomes (your objectives); which will in turn contribute to final impacts (your aims)

A change pathway / impact chain reveals the interrelationships between activities, outcomes and impacts and therefore also your change assumptions or theory about how you think change will be achieved.





Sometimes not everything is that simple...





# Performance cycle

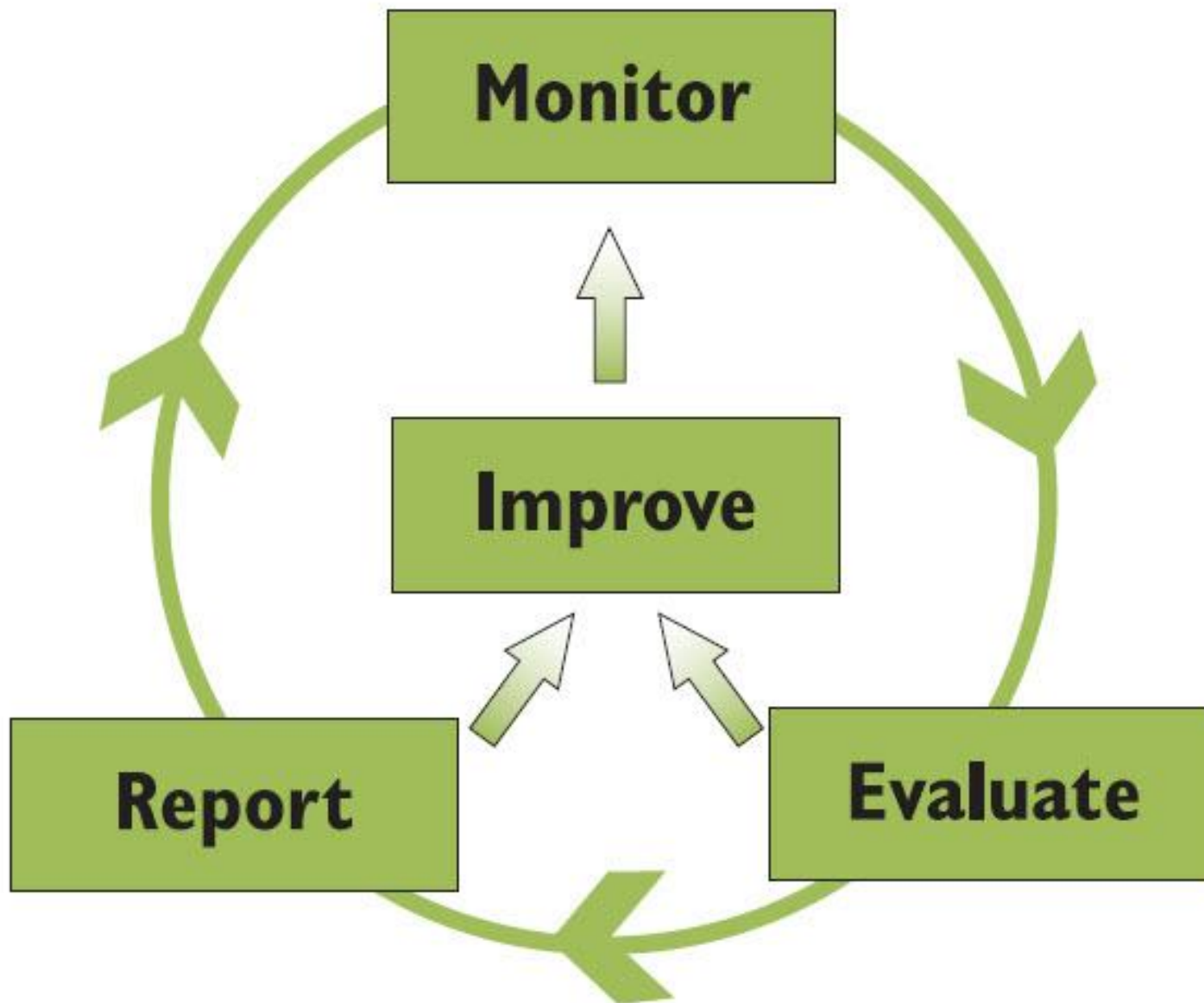


# The crucial part of the cycle

- with the monitoring data output at hand, it is time to step back and
- evaluate what has been achieved. The data collected through monitoring are used for evaluating both the results obtained through implementation and the way the management cycle is working. The next step is to
- report the results – both achievements and failures) to all of the stakeholders
- Action Research in action

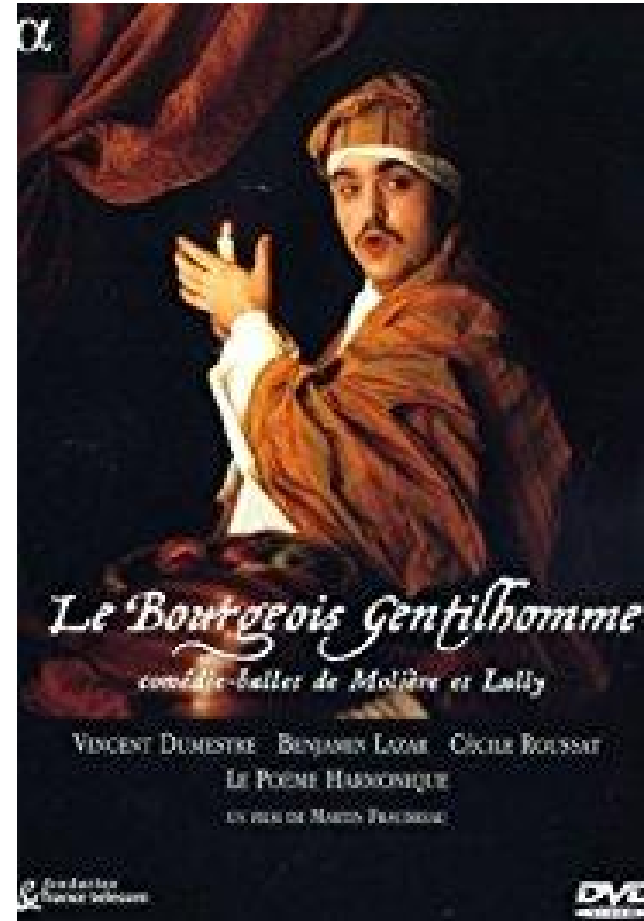
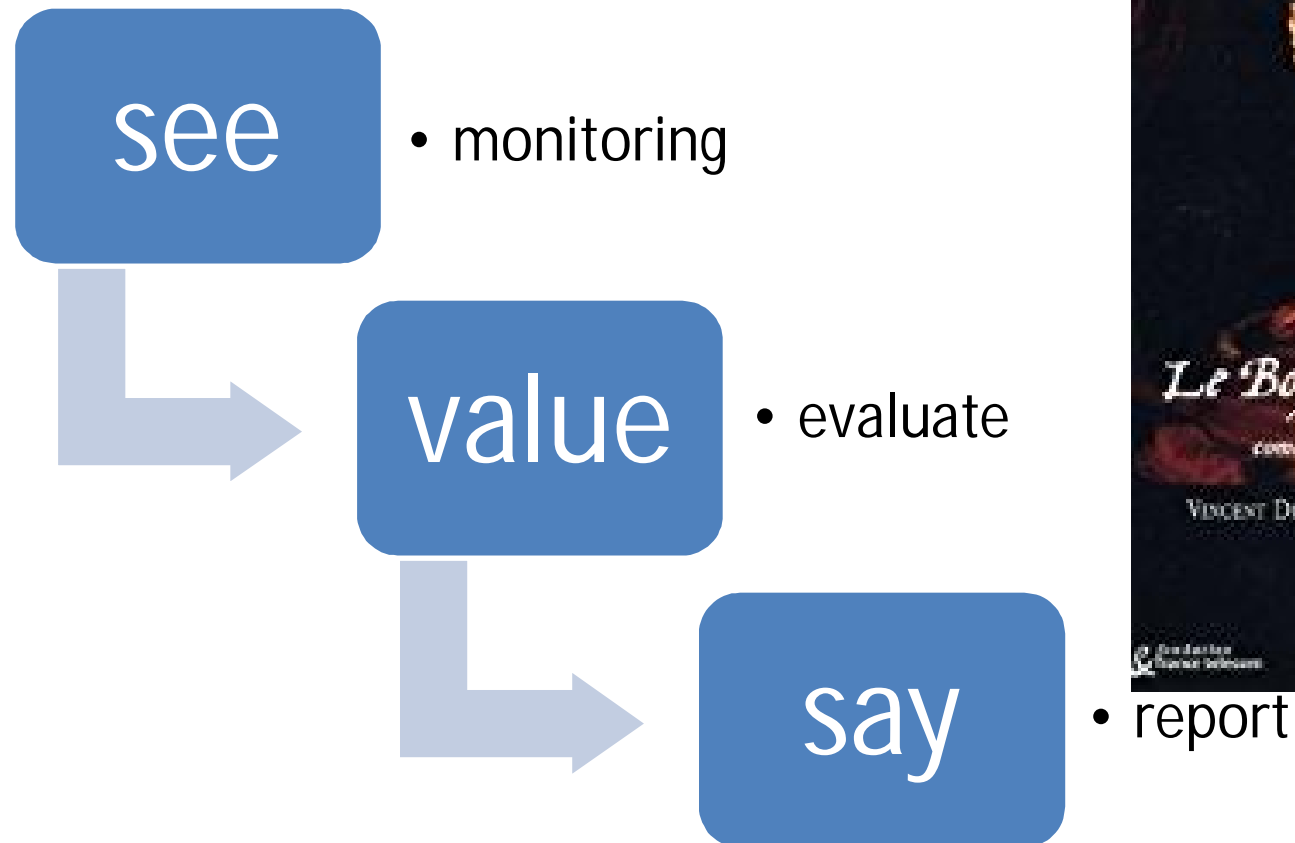






# Important phase: make the line into circle

- We are all Mr. Jourdain
- Like a prose speaking



# The essential trio (MER)



## Monitoring

regular observation and recording of activities taking place in a project  
collection and analysis of information undertaken while the project is ongoing



## Evaluation

planned, systematic process that assesses the achievement by pre-set criteria  
periodic, retrospective valuation of a project



## Reporting

informing stakeholders, decision-makers and the public about progress in implementation of the strategic programme and its action plan

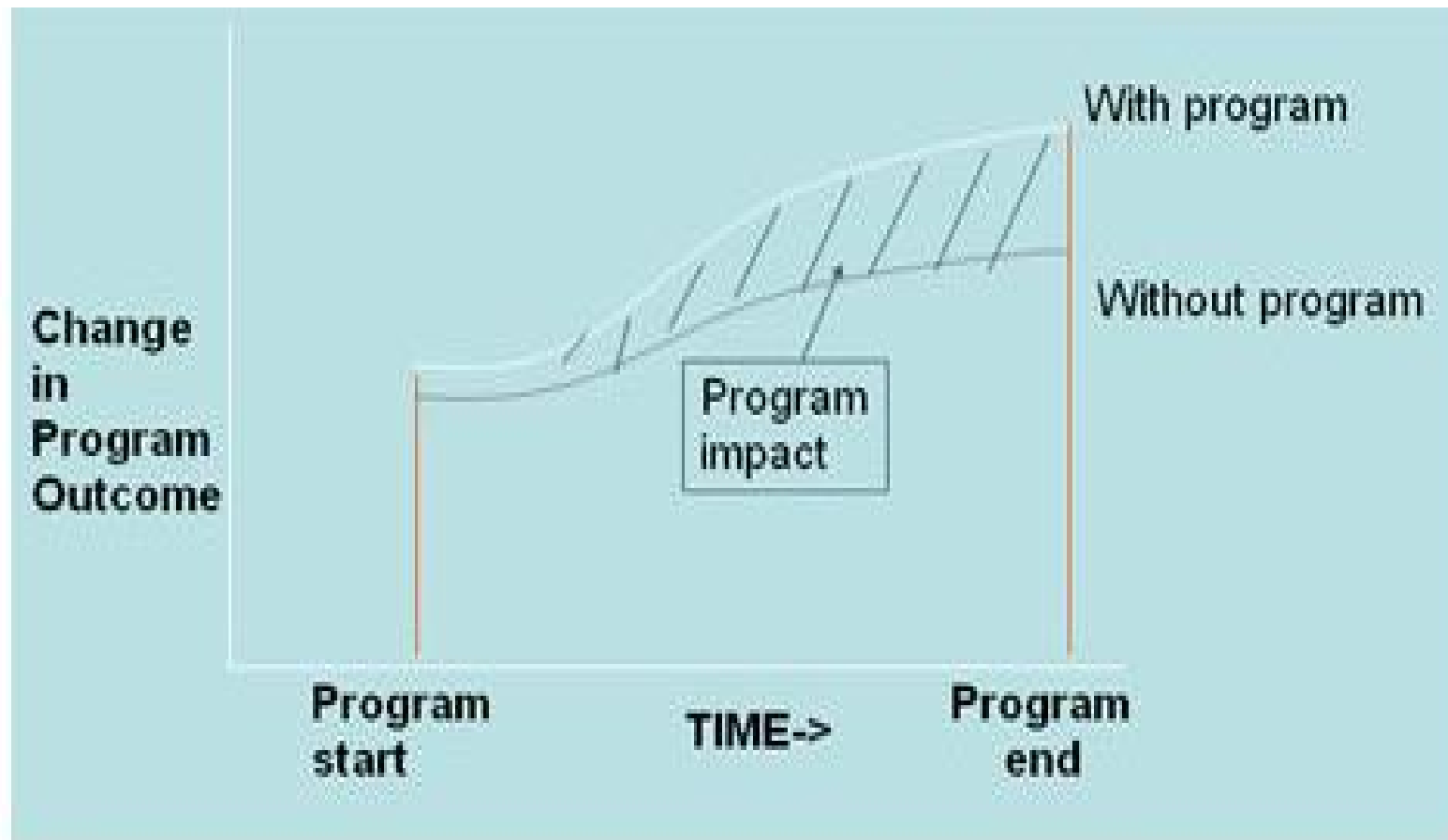
# Why to do it?

- It analyses what has happened during in order to understand why things happened or failed to succeed.
- It provides the decision makers with a basis for taking further decisions on the targets and actions for a new cycle.
- It provides the stakeholders, including the public, with a report on what the city has done during the year and how they have succeeded in fulfilling their targets.
  - How to act on the results of the MER process?
  - How will the knowledge gained be used to adapt or set the short-term targets for the next year?
  - What actions should be implemented next year?
  - Is there a need to revise the baseline review because of major changes in the city or its surroundings?



# Everything You Always Wanted to Know About the Project\*

(\*But Were Afraid to Ask)



Adapted from Gage and Dunn 2009, Frankel and Gage 2007

# Marry MERing

- strengthens project implementation.
- provides an opportunity to:
  - Compare implementation efforts with original goals and targets,
  - Determine whether sufficient progress is being made towards achieving expected results and,
  - Determine whether the time schedule is observed.
- Only when
  - the data collected through the monitoring process is analysed,
  - evaluated and
  - reported to stakeholders can it help to
- improve the management system by identifying flaws, failures and particularly successful elements in both the way the process was organized and implemented and the outcome.

# How to approach monitoring, evaluation and reporting?

• What is happening?	Monitoring
• When is it happening?	Monitoring
• How is it happening?	Monitoring
• Why is it happening?	Evaluation
• Is it good or bad?	Evaluation
• Are the changes significant?	Evaluation
• Does the response need to be modified?	Evaluation
• Is there a need to review targets?	Evaluation
• Do we need to change indicators?	Evaluation
• What shall be reported?	Report
• Who needs to be informed about what?	Report
• When the report has to be done?	Report

# To MER, or not to MER?

- The first step is to be clear about
  - why you want to do MER and
  - the benefits it can offer.
- MER can sometimes seem like
  - an unaffordable luxury,
  - an administrative burden, or
  - an unwelcome instrument of external oversight.
- But if used well, MER can become a powerful tool for social / political / economic / cultural / environmental / legal / technical change.



# Reasons of MERing

- MER process provides usable results to project implementers – information that can be utilized by project managers and staff to improve results.
- An effective evaluation can help ensure that the actions selected achieve your goals and targets.
- The MER process provides an important information why/why not, and what modifications are necessary to keep the efforts on track.
- As a critical feedback loop, it is then important to share programme results with community members, and other stakeholders.
- Although this step appears at the end of the cycle, it is only the beginning of the next cycle. The next step would be to consider if the baseline review or strategic programme needs to be adapted.

# What difference you are making?

- assess and demonstrate your effectiveness in achieving your objectives and/or impacts on people's lives;
- improve internal learning and decision making about project design, how the group operates, and implementation i.e. about success factors, barriers, which approaches work/ don't work etc.;
- empower and motivate volunteers and supporters;
- ensure accountability to key stakeholders (e.g. your community, your members/supporters, the wider movement, funders, supporters);
- influence government policy;
- share learning with other communities and the wider movement;
- contribute to the evidence base about effectiveness and limits of community action

# Agreeing some guiding principles

- focused and feasible in relation to your available resources so that it supports rather than diverts resources from action (i.e. make sure you focus information collection on what you 'need to know', not on what would be 'nice to know');
- useful and timely information to improve group learning, group decision making, and project design;
- useable by, and/or comparable to, data collected by other stakeholders so it contributes to the wider evidence base;
- credible, valid and reliable to the extent possible within your available resources;
- sensitive to unequal power relations when you collect information (i.e. ensure that you listen to people who might be marginalised in the community or do not have a strong voice);
- ethical e.g. in relation to data consent and protection.

# Who to involve in your MEP?

- Identify the key internal and external stakeholders, and decide how to involve them in the design, implementation, analysis and/or communication of findings.
- Consider their information needs, as well as your own.
- You might want to include:
  - people directly involved in your project
  - stakeholders in your wider community (geographic or community of interest) such as specific groups of residents, specific networks, community groups, the wider movement
  - external stakeholders e.g. funders, local and national policy makers.
  - It might also be possible to work in partnership university departments.



# Key internal issues

- Organisational capacity/group processes – how well are you working together?
  - needed resources (human, financial, technical);
  - leadership and vision; management (e.g. clarity about aims, objectives, roles & responsibility; adaptability);
  - cost effectiveness;
  - sustainability (e.g. finance and/or volunteer burn out)
- Joint working – how well are you working with others, for example in
  - relation to partnerships, the wider movement, alliances, coalitions;
  - disseminating or sharing good practice and techniques

# Key external issues

- Relevance/acceptability - how relevant are your projects to different sections of the community?
- Effectiveness - are you achieving your objectives (e.g. in relation to attitudes & values; behaviours; public support; community capacity/local resilience; the wider movement; improved policies & increased democratic space)? What internal or external factors are facilitating/constraining progress?
- Impact - what is your impact on people's lives (e.g. in relation to the ultimate changes in people's lives or environment as a result of our initiatives)?
- Contribution/attribution - what contribution have you made to outcomes and impacts (in relation to other factors/actors)?

# monitoring



# Monitoring

- Monitoring is the systematic and routine collection of information:
  - ✓ To learn from experiences
  - ✓ To improve practices and activities in the future;
  - ✓ To have internal and external accountability of the resources used and the results obtained;
  - ✓ To take informed decisions on the future of the initiative;
  - ✓ To promote empowerment of beneficiaries of the initiative.
- Monitoring is a periodically recurring task already beginning in the planning stage of a project or programme.
- Monitoring allows results, processes and experiences to be documented and used as a basis to steer decision-making and learning processes.
- Monitoring is checking progress against plans.
- The data acquired through monitoring is used for evaluation.

# Identifying what information you need to collect

- Generally you are likely to need information to:
  - Track and assess what has changed (intended and unintended);
  - Understand the reasons for changes: what actors/organisations/individuals have facilitated/constrained change (including your contribution);
  - Interpret the changes: people's perceptions and experiences of change.
- The information you collect might either be
  - Quantitative information expressed in numerical terms as numbers and ratios for example. This information will allow you to answer 'what', 'how many' and 'when' questions.
  - Qualitative information is expressed through descriptive prose and can address questions about 'why' and 'how', as well as perceptions, attitudes and beliefs.



# Evaluation

- Evaluation is assessing, as systematically and objectively as possible, a completed project or programme
- Evaluations appraise data and information that inform strategic decisions, thus improving the project or programme in the future.
- Evaluations should help to draw conclusions:
  - ✓ relevance
  - ✓ effectiveness
  - ✓ efficiency
  - ✓ impact
  - ✓ sustainability
- An evaluation should provide evidence-based information that is credible, reliable and useful.



# Evaluators dilemmas

- Was the action effective in achieving its intended result?
- Was the action plan sufficiently clear in specifying responsibilities? If not, what wasn't clear?
- Analyse progress step-wise: if there were deviations, at what point did they occur? Why? What corrections can be undertaken at this point?
- Was the budget estimate correct or did overspending occur?
- What are the lessons learned with regards to implementation planning?
- The evaluator must consider how the evaluation results will be used at the outset of the evaluation process.
- The more people who have been actively consulted in the process, the easier it will be to use the results for project improvement.

# Evaluation goals

- The evaluation contains a summary of all actions undertaken as well as comments to and interpretations of the specific achievements and deviations from the targets.
- The evaluation is an important input to drawing lessons from the implementation experience and using the experience to improve the next cycle.
- It should formulate concrete recommendations for changes in the strategic programme and action plan.
- It must refer to objectives and targets:
  - Both *the process* (How have actions been implemented, how can the process be improved?) *and the results* (Have the targets been reached? Why/why not?)
  - What changes would be needed to reach the targets? or: Do the targets need to be adapted?) need to be evaluated.

# Utilizing evaluation results

- And more questions
  - What are the “triggers”? In other words, at what point do you make changes to policies or programmes based on evaluation results?
  - Who decides whether to make these changes?
  - Who holds implementing institutions accountable for making those changes? Who “enforces” the situation?
  - When are changes made? On an ongoing basis?
- Evaluation is not an ad hoc idea: it is an inherent element of the process
- A valuable evaluation is reproducible and repeatable. It thus needs a standardized method, which is set up in advance
- The findings, recommendations and lessons of an evaluation should be used to inform the future decision-making processes

# Reporting



# Reporting

- An effective reporting system combines the data collected within the monitoring system with implementation responsibilities and results of evaluation process. It aims to inform:
  - ✓ the stakeholders about the progress of the project
  - ✓ the decision makers about the consequences of their actions
  - ✓ the public about the progress of the project.
- It provides a system of accountability for all responsible parties on how well they are achieving the objectives and targets established in the strategic programme:
  - ✓ How do you target the presentation to the primary user group?
  - ✓ What is the right moment for publication of the report?
  - ✓ Identify the main messages to go out to the media and target groups
  - ✓ Get ready for the feedback

# Communicating

- It is important to communicate the results of the MER to the relevant stakeholders. This might involve:
  - Deciding key audiences e.g. community group, community, donors, policy makers and the media
  - Tailoring and packaging the data to key stakeholders/audiences
  - Converting data into graphs, pie charts etc.
  - Drawing out key lessons for key stakeholders/audiences
- The information could then be incorporated into reports or provide a useful background document to give people who want to know what your group does.
- Ethics and data protection is very important;
  - gain informed consent from research respondents/participants,
  - ensure their anonymity in the communication,
  - respect data protection laws.

# The MER success factors:

## 1. Be organised

- Well planned actions are leading to success more often
- Make sure that your expectations are feasible
- MER procedures shall be clear and necessary
- Regularity: the project plan should be monitored and updated often and regularly.

**BEING ORGANISED  
IS NOT  
ABOUT PERFECTION IT  
IS ABOUT  
FINDING WHAT  
YOU NEED WHEN  
YOU NEED IT.**



# The MER success factors:

## 2. Be flexible

- Flexibility: tasks are often underestimated, and many new tasks will be identified as the project moves forward.
- Rolling Wave Planning – when you plan down to the level of detail currently known and go back to plan deeper once more information is acquired.



# The MER success factors:

## 3. Realise shoals

- Possible threats that can get you bogged down:
  - project plans never updated beyond the first draft;
  - using non-binary milestones;
  - reporting tasks as partially completed;
  - ignoring warning signs and pressing on in the hope everything will turn out right in the end.

### things to remember when you get stuck



# The MER success factors:

## 4. See the signs

- It is especially important to see, and even to important to read, the possible predicaments in advance
- Warning signs:
  - the number of open issues continues to rise;
  - rising stakeholders diffusion;
  - changed external miliuex;
  - contingency plans are used faster than the rate of progress on the project.







# Getting the Right Resources

- A major contributor to the success of projects is the availability of dedicated resources.
- Two or more people equal different experiences, professional networks and healthy debate.
- Getting good people appointed as dedicated resource for projects early is a tough challenge and some compromise is often necessary.
- The challenge for the project manager consists of attracting the right resources, forming a cohesive team, keeping the team motivated, meeting individual aspirations and getting the work done - all within scope, cost, time, and customer satisfaction!
- Common Mistakes: not enough experienced committed resource from the business; appointed resource overcommitted and unable to devote enough time to the project.

# Managing the Risks

- The task of the project manager is to identify the most severe risks and plan to minimise them, and continue to focus on the major risks throughout the project.
- Basic risk management techniques: Avoidance; Control; Assumption; Risk Transfer
- You should consider using a risk mapping approach (identify the project objectives; prioritise the objectives; identify the key risks to missing those objectives; take preventive action; track and update risks monthly using a risk log)
- Never expect initial risk management plans to be perfect.
- Common Mistakes: reluctance to focus on risks; the Steering Committee not wanting to be presented with 'threatening statements about project failure' and only wanting to hear good news; waiting too long and taking a reactive approach to risks.
- To ensure project success, you need to take the right risks and you need to be aware that, that is what you are doing.

# Communicating Progress

- Regular reports, anything from weekly to monthly, should be issued to all other interested parties. Frequent communication is essential to the well-being of any project.
- The report should be as-brief-as-possible and summarise key points, this ensures that people are kept informed, involved and committed.
- Regular progress reporting creates a valuable written record of the projects' life. This can be used later to look back and decide how to improve the running of future projects.
- Common Mistakes: poor communication channels; lack of honest communication; not asking for help when it is needed.
- Warning Sign: unwillingness to communicate bad news.



# Consultation and Leadership

- During all stages of the project, there should be widespread consultation with many parties.
- However, the project should ultimately be controlled by a small, dedicated 'core' project team, which is focused on achieving a concrete result. This will make sure that when difficult decisions have to be made, they are made clearly, forcefully and quickly.
- Engage in lots of consultation, but do not have too much democracy. If you want to achieve real business results in a realistic timeframe, a small team operating on Stalinist principles is more likely to succeed, than large committees acting as talking shops. This is especially important for regional, cross regional and global projects.
- Common Mistakes: making a decision and then starting a debate; not getting a real agreement, and then having to revisit the issue; failing to stay goal focussed.

# Realising the Benefits

- On most projects, the team is disbanded soon after delivery, but after the usual development and implementation stages, the project team can be retained for a third stage called 'benefits realisation.'
- A project should only be considered completed when the benefits have been delivered to the beneficiaries and not when the project has just been delivered.
- It is a central tenet of the Benefits Realisation Approach that benefits come only with change and, equally, change must be sustained by benefits.
- Changing the way people think, work and manage is no easy task, but without it your project is in danger of joining a long list of successful project deliveries that never realised their expected benefit or result.
- Common Mistakes: believing that a project is over once the delivery and implementation is complete; expecting benefits automatically to drop out of the project without any effort; expecting benefits without change.

# Learning the Lessons

- Every project has the potential to help you run future projects more efficiently. Assess the project whether it was a great-success, total failure or anywhere between. Concentrate on the big, important lessons from the project, the ones that will have a significant impact-on your future projects.
- problems preventing-us-learning valuable lessons from past projects: we think the lessons don't apply to us; we want to get things done; time spent in doing the work better is time well-spent; that getting it right the first time is cheaper and easier than doing it now and fixing it later.
- If we don't take time to learn the lessons of the past, and-also act on them, we will continue to commit the same mistakes again-and-again.
- Common Mistakes: being too busy to evaluate projects when they have finished; moving on to your next project before reviewing the last; failing to learn lessons from past projects; not making lessons learned available to other people in the organisation.

# Celebrating Success

- Before moving on to your next project, it is worth spending some time to celebrate your success. It provides a way to say, 'thank you' to your team and helps with motivation.
- Always publicise your successes both inside and outside the organisation. This will help raise you and your teams profile and credentials for future projects.
- Completion of a project and the steps along the way can be intrinsically rewarding for project team members. Outwardly celebrating successes also can be a source of motivation for the team.
- When project milestones are reached, they should be communicated to project team members and stakeholders. Small rewards for team members who go above and beyond their duties also should be considered to communicate a job well done.
- True motivation comes from achievement, personal development, job satisfaction and recognition.

Source: 21 Ways to Excel at Project Management, Project Smart,  
Trevor L. Young, How to be a Better Project Manager (London: Kogan Page Limited, 1998)

