MONITORING & EVALUATION IN GLOBAL HEALTH

An Introduction to Evaluation

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In this lecture, we will discuss what evaluation is, the purpose it serves, the ways in which it differs from monitoring, and how the two work together to make a program more effective.

When you work on a program, how do you know if the program really made a difference in the lives of the people it intended to serve? How can you tell if it achieved what it set out to do? This is where evaluation plays an essential role. Evaluation is a systematic process of collecting, analyzing, and using information about a program's design, implementation, and results to determine its effectiveness and inform future decisions about program implementation.

Evaluation works jointly with monitoring to assess and improve programs; however, there are many ways in which the two processes are distinct from one another. While monitoring routinely tracks the progress of program activities, evaluation assesses the extent to which those activities resulted in achievement of program outcomes. Evaluations are commonly used to:

- Understand why activities have (or have not) been implemented as planned
- Explain whether the program had an effect
- Determine the extent to which measured or observed changes can be attributed to the intervention
- Describe if the intervention had any unintended consequences
- Assess whether a program was cost-effective

Let's consider an example. Imagine your work plan includes an activity to conduct 10 trainings for community health workers in administering contraceptive injections to women of reproductive age. Monitoring can tell us how many trainings were conducted and how many community health workers were trained from each target district. This information is very helpful in terms of knowing what the program is doing and what progress has been made. Let's assume all the trainings were completed on time. The facilitators tell you they felt the trainings were a huge success and that the "community health workers have increased their knowledge about contraceptive injections." Based on the information we have; can we say that the trainings made a difference in the health workers' knowledge?

No, we cannot because we have *no evidence* to back up that statement. Trainers' perceptions of how well the trainings went are not sufficient to make this conclusion, nor is the fact that trainings were completed on time. But an *evaluation* can give us that necessary evidence. It helps us to objectively answer the question of whether or not the trainings made a difference.

If we were to evaluate the outcome: "community health workers have increased knowledge about contraceptive injections," we would have to do so *before* and *after* the intervention occurred. In this case, we might use methods like a pre- and post-training test to assess health workers' levels of knowledge before and after the trainings to determine if there was an improvement in scores, and what the level of improvement was. We could enhance our approach by adding written evaluations asking participants about their experiences with the course and have them do a written self-assessment of their learning by topic area pre- and post-training. In addition, we could have someone, either an external evaluator or a staff person not involved in the training, conduct observations during all the trainings and use a standardized rubric to assess levels of participant engagement and quality of facilitation. Together, these methods would provide us with a solid collection of evidence to tell us the extent to which the outcome 'increased knowledge' was achieved as a result of the training.

Another difference between monitoring and evaluation is their **data sources**. While monitoring data is often extracted from existing reports or records, evaluation requires measuring changes at the population or beneficiary level. To do this, you often need to collect additional data from the intervention's target group. This is called *primary data*, or data which are collected firsthand by the evaluator from an original source and for a specific purpose or program.

There are also distinctions in the **type of participants** who typically conduct monitoring activities versus evaluation. For instance, monitoring is primarily done by people directly involved in implementing the program, such as program staff, M&E officers, data clerks, and program users. Evaluation usually requires consultation with program staff, though they play a lesser role than with monitoring. Instead, evaluation relies heavily on more experienced, senior M&E staff and often includes external evaluators, advisors, collaborators and/or donor input.

The **timing** of evaluation data collection can also be different from monitoring. As noted previously, monitoring data are gathered and reviewed on a regular, continuous basis in order to correct course as needed. Data for evaluation are often only collected at specific points in time before, during or after the project or program, such as at baseline (before a project/program starts), mid-point (to gauge progress), at the end (to measure outcomes) or several years after the project or program ends (to determine impact). Evaluations are usually carried out when staff or donors want to make key decisions about the program, like how to improve it, which activities to continue or discontinue, how to allocate funds, and whether or not to scale it up.

In this lecture, I described what evaluation is and how it can pair with monitoring to make a program more effective. I also talked about how evaluation differs from monitoring, including in purpose, scope, data sources, participants, and timing.