Beyond Accountability: Harnessing the Power of M&E to Improve OVC Programming

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Recognition of the importance of M&E in the context of OVC programming is widely accepted. Increasing the effectiveness of programming is a shared goal among donors, government, and national and local civil society organizations in order to maximize the support provided to children and their families. At the same time, donors require grantees to collect data on inputs and outputs in order to monitor the use of the funds they receive. However, there remains confusion about the use of data to also improve programs. The authors "unpack" the catchall acronym of "M&E" and describe the basic purposes of monitoring and evaluation systems that are implemented within OVC programming. These purposes include: a*ccountability*, *increasing the size of the response*, *improved programming*, and *advocacy*.   Failure to match the purpose of M&E with appropriate methods can result in undermining the overarching goal of improving the well-being of children. Examples are provided whereby M&E that has been implemented for the purpose of accountability fails to result in improved programming and, in some cases, undermines the effectiveness of the interventions. The importance of implementing M&E efforts that *improve programming* in addition to providing the data that is necessary for *accountability* is stressed. Emphasis is placed on the design and implementation of M&E that results in increased effectiveness of programs in order to optimize the use of scarce resources in supporting vulnerable children, their families, and their communities.

Keywords: Monitoring, evaluation, program effectiveness, accountability, orphans and vulnerable children

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Introduction

With the publication of "*Children on the Brink*" (Hunter and Williamson, 1997),
estimates of the number of children who had lost one or both parents due to AIDS were
first made available and the enormous ramifications of the disease on the families of
those who had died became quantifiable. Since then, the growth of the response has been
significant; large amounts of external public and private funding have been made
available to support "OVC"[1] efforts. However, the numbers of children and their families
who have been affected by the disease and are in need of such support still far exceeds
the size of the response. The huge gap in resources reinforces the importance of the role
that monitoring and evaluation (M&E) must play in strengthening the effectiveness and
the efficiency of OVC programming. M&E is a basic requirement of most donors and is
reflected in plans, proposals, reports and inclusion of M&E personnel within
implementing organizations. However, confusion remains about how to harness these
efforts to improve programs.

Long before and more far-reaching than the externally-funded response, have
been kinship and community initiated efforts to support relatives and neighbors who are
affected by death and illness. These are the responses that are best placed to mount a
sustained effort to identify and reach those most in need. Yet at the same time they are
the least equipped in terms of material resources. As stated in the Global Framework on
Children and AIDS (Global Partners Forum, 2004), families and community groups must
be key beneficiaries of external support in order to achieve a long-term impact on the
children most in need. Any discussion of M&E in the context of OVC programming
must take into consideration the effect of M&E systems on these community efforts and
the potential for community groups to be active participants in utilizing these systems.

This document attempts to clarify some of the issues, the opportunities, and the challenges that affect the way M&E can be used to optimize the efforts and resources that are intended to have a positive impact on vulnerable children and their families. The focus is limited to M&E with regard to OVC *programming* interventions because expanding the scope of the document to include M&E of OVC *policy* – though extremely important - would be too large a task.

Unpacking the M&E acronym

"M&E" is a catch-all acronym that has been used to refer to a countless variety of systems and activities. To understand the acronym within OVC programming, we have used the *input-activity-output-outcome-impact* framework (UNICEF, 2005; The Global Fund to Fight AIDS, Tuberculosis and Malaria, 2009). However, even within this oft-used framework, the terms have different meanings for different stakeholders. "Inputs" generally refer to the resources that are available to the program, and the activities yield the "outputs", which are the immediate and observable results or products of the activities. Outputs might include the number of caregivers attending a training workshop or the number of education bursaries paid to a primary school.

Monitoring relies on process-related indicators and involves routinely collected data that measure the quantity and/or quality of the inputs, activities, and outputs. Monitoring is used to make sure the program is "on track". (International HIV/AIDS Alliance and FHI, website). To date, donor-required M&E has most often focused on monitoring inputs and outputs to children and caregivers and has been used for the purpose of *accountability.*

Evaluations are conducted on a periodic basis and are generally used to determine the short-term effects of a program ("outcome") and/or its longer-term "impacts". For example, indicators to measure outcomes in OVC programming might reflect an increase in the number of children attending school, an increase in positive interactions between children and their caregivers, or the number of children reporting that they receive food more often. Examples of longer-term impacts might be improved educational levels, improved psychosocial well-being, or improved growth among targeted beneficiaries. Program evaluations can be conducted for the purpose of contributing to the general knowledge base, as well as to a specific program's understanding of how to improve its activities. Generally, they involve the collection of additional data, but often benefit from data collected by routine monitoring systems.

Evaluation implies that *change* is being assessed, determining whether the intervention or components of the intervention *caused* the change. To determine whether the change that is observed is caused by the intervention and not by other factors in the environment, the randomized control trial (RCT) is the gold standard. Evaluations using comparison groups, random selection and/or statistical methods to correct for factors that bias the selection – and therefore the comparability - are necessary to impute causation between the intervention and the results. There are significant challenges to using RCTs to evaluate interventions and produce results that can be used to inform and improve OVC programming. Evaluation methods that demonstrate outcomes and impacts that can be attributed to a particular intervention require more time, money, and human resources than are often available to individual implementing organizations. Few such evaluations have been used to evaluate OVC programs. However, donors are increasingly

recognizing the importance of assessing outcomes and impacts of OVC programming. Funding for evaluations using rigorous methods are generally made available for large-scale projects by public donors or foundations that have a mandate to contribute to the "public good" by building the OVC programming knowledge base.

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Box 1. Using Comparison Groups to Evaluate OVC Programs

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OVC programs are often implemented in contexts where children and their families are living in extremely harsh and impoverished situations. When the condition of these children might realistically be expected to deteriorate, *stability* may, in fact, be considered a desirable result, and more realistic than *progress*. For example, an evaluation conducted by World Vision in Zambia compared school enrollment among OVC and non-OVC in an intervention site and in a comparison site. Fourteen months after introducing the intervention, they found that school enrolment among OVC had not significantly increased, while that of non-OVC had. Without a comparison group, they might have concluded that the interventions were not effective in increasing school enrolment among OVC in spite of the qualitative data that the intervention was successfully supporting OVC to enroll. However, analysis of OVC in the non-intervention site revealed a significant decrease in school enrolment among the OVC in that area. Though the intervention did not significantly increase enrolment among OVC, it was effective at reducing the percentage of OVC who dropped out of school or were not enrolled at the intervention site, which was indeed a valuable result of the program (J. Chege, personal communication, June 26, 2009).

There is growing recognition of the validity and importance of alternative methods of evaluating programs within the social sciences (San Francisco AIDS Foundation, 2008). Triangulation, in which multiple types of methods are utilized, provides complementary perspectives that deepen an understanding of how programs are affecting beneficiaries. Evaluations that do not collect information from a comparison group cannot establish attribution, but can provide useful information to improve programs. For example, in-depth interviews with program implementers and beneficiaries can reveal intended as well as unintended consequences of specific aspects of programs. Qualitative, as well as quantitative, data can be used to identify barriers to achieving the program outcomes and can also stimulate creative solutions to overcome those obstacles.

Clarifying the purposes of M&E

Numerous types of M&E frameworks and methods have been used in the context of OVC programming. The multiple aims of these M&E systems vary by the type of organization that mandates, creates, and implements these systems (i.e. public and private donors, government, civil society organizations, including non-governmental, community- and faith-based organizations); and the level at which they are intended to be implemented (i.e. global, national, local). The following table summarizes the main purposes of M&E within OVC programming.

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Table 1. Purposes of M&E in OVC Programming

Purposes of M&E	Description of Purpose
Accountability	Ensures resources are being expended as planned. *Answers the following questions:* 1. Are resources being utilized according to initial agreements and the planned use of the funds? 2. Are the objectives of the interventions being met?
Increasing the Size of the Response	Provides data to inform planning for policy and programming, including initial planning and progress toward achieving increased coverage and identification of existing gaps. Monitors what is being done, relative to what is needed. *Answers the following questions:* 1. Where are we going? 2. Where did we come from? 3. How far to go?
Improved programming	Maximizes impact (effectiveness) and maximizes use of limited resources (efficiency). *Answers the following questions:* 1. What is the best way to get to where we want to go? 2. Are we accomplishing what we set out to achieve? 3. How can we adapt our activities to better serve beneficiaries?
Advocacy	Raises visibility; commitment to the response; and garners additional support and funding.

The importance of keeping the purpose of the specific M&E effort in mind in order to choose the most appropriate methods and activities cannot be overstated. The paragraphs below offer further explanation of the purposes of M&E within OVC programming.

Accountability

The use of the large amounts of both public and private resources that have been mobilized to respond to the needs of vulnerable children are monitored to assure that they are being used according to their original intent. *Accountability* is the primary purpose of the M&E systems required by most donors. For example, PEPFAR set targets and monitors progress toward those targets, requiring grantees to report on the number of children receiving services or the number of caregivers trained (PEPFAR, 2006). Data is aggregated in an annual report that is submitted to Congress and made available to the American people, who are the ultimate donors of these funds. By making M&E results transparent, government and non-government stakeholders are able to hold implementing organizations accountable for the funds received.

Increasing the Size of the Response

Monitoring the scale of the response requires information on the number of children and households receiving support, relative to those who are in need. Data on the number of children who are receiving support is available, because it is the most common indicator collected by implementing organizations for the purpose of *accountability*. A significant challenge to monitoring coverage of OVC programs is that data is needed to measure the

size of the target population (the denominator) in order to compare the number of

children who are reached with the number who are not yet reached. Statistical modeling

has been used to estimate the number of orphans (Grassly & Timaeus, 2005; UNAIDS,

2007), and efforts are underway[2] to define and then measure the number of "vulnerable

children". A number of governments have included M&E within their OVC National

Plans of Action and some have begun to pilot and implement these systems. For

example, the OVC Management Information System that is being piloted in Uganda will

compile data from service providers at local and district level, to be aggregated at

national level. This system will provide ongoing information on the needs of vulnerable

children and their households through household surveys; the organizations that are

responding to those needs; the extent and location of coverage; and, therefore, the current

and changing gaps. (Uganda Ministry of Gender, Labour and Social Development,

website). At local level, this data on current coverage and existing gaps can also be used

to mobilize action by the community and by local non-government organizations (NGOs)

and community based organizations (CBOs).

Improved Programming

To date, harnessing the power of M&E to generate and use data to *improve programs*

remains a crucial but oft-missed opportunity. Though the overarching goal of

stakeholders is to improve the well-being of children and their households, M&E efforts

designed and used for the purpose of improving programs to better achieve that goal are

relatively rare. While the aim of improved programming is often expressed, it is seldom

realized. Evaluations that use a methodology rigorous enough to link interventions with

their effect on beneficiaries can contribute to the knowledge base that informs OVC programming in general, as well as providing information to improve the specific programs being evaluated. Evaluations that are conducted with a lesser degree of rigor can also be used to identify factors that enable sound implementation and to modify factors that detract from programs' success.

Advocacy

Even though the M&E is often initiated for other purposes, reports on the results of M&E have been successfully used to enhance visibility of the situation of children and programming efforts at the global, national, and local levels. Implementing organizations have been able to use data from their M&E efforts to garner additional support from donors and other stakeholders. For example, results from an M&E system led to increased funding for a CBO that participated in the Firelight Foundation's M&E training in Lesotho. Out of 120 applicants, the organization was the only small CBO to receive human rights funding from the U.S. Embassy Small Grant Fund in 2008. *"[Embassy] officers were shocked to find out that we are even capable of monitoring and evaluating our project. Remember, we had written our proposal by ourselves – there was no outside assistance."*

Matching M&E purposes with appropriate M&E methods

The authors contend that OVC stakeholders must better align the purpose of their M&E efforts and the M&E system design, methods, and ultimately, use of the data. Otherwise, resulting M&E systems have the potential to undermine the overarching goal of

improving the well-being of children. For example, implementing M&E systems for the sole purpose of *accountability*, without considering their effect on the program activities can result in the "tail wagging the dog". Indicators that are required by donors influence decisions by program implementers who have a strong incentive to report large numbers associated with those specific indicators. This can unintentionally influence the type and approach of services provided. If required to report on the number of children who receive a particular service, service providers may be more likely to focus on increasing that particular service whether or not it is the most beneficial to the target population.

The effect of the tension between the mandate to monitor programs for the purpose of *accountability* and using M&E data to *improve or maintain quality interventions* was described in a study supported by the Joint Learning Initiative on Children and AIDS (Blackett-Dibinga and Sussman, 2008). The objective of the study, conducted in partnership with Save the Children/US, was to document the community-based management information systems (CBMIS) that were being implemented by a PEPFAR-supported OVC program in Mozambique.

The researchers found that data collection focused on collecting the information that was needed by the donor for global level *accounting* purposes. At community level, data on the number of children receiving the services and the type of services they were receiving was collected using forms and processes that were developed by the implementing organization at national level. Despite its potential to be used as part of a participatory approach to data collection at the community level, the study found that local stakeholders and service providers were not also using the CBMIS information to guide a reflective process to *improve programs*.

In this case, M&E systems that could have contributed to *improved programming* were primarily used for *accountability* purposes. The resources used to set up a CBMIS were significant, including mobilization of time and commitment of community members who were responsible for collecting the data. The opportunity to build community ownership of the interventions was lost. Instead, the community level data collection was viewed as a task imposed by an external organization. Information was collected for, and sent off to, the external donor. There was no community involvement in deciding on the type of information they would collect. There was no analysis, reflection or other use of the data at the community-level. This contributed to the perception that the intervention was externally driven, thereby undermining ongoing community-level commitment and reinforcing a reliance on external impetus and inputs for support to children in the community. In this case, failure to match both of the M&E purposes with appropriate M&E methods contributed to inefficient processes and missed opportunities to improve the effectiveness and sustainability of OVC programs.

However, the study also documented a few positive unintended consequences in those communities where the CBMIS was used for a different purpose than originally intended. Some community leaders took the initiative to use the data for *advocacy* and fundraising. They were able to approach local stakeholders and new donors with the data that documented the number of children they were reaching. The data strengthened the funding proposals, and they obtained additional funds as a result, thereby *also increasing the size of the response.*

Unleashing the potential: Examples of utilizing M&E to strengthen OVC programs

The potential for using M&E methods to *strengthen and improve programming* has long been acknowledged among OVC program practitioners. This process builds on a long history of participatory M&E practices in the development community. (Taylor & Taylor, 2002; Kadiyala, 2004; Shah et al, 2006). These approaches generally include community members as active participants in selecting the type of information that will enable them to determine whether they have achieved their objectives, collecting the information, and making decisions about community-level action that are based on their analysis of the data. This type of process recognizes the importance of strengthening ownership at the community-level and sustaining commitment to supporting children within the community. M&E frameworks are often developed and imposed on community groups and local organizations that implement the M&E system as one of the "hoops they must jump through" to maintain the funding they receive. However, when they are supported to develop M&E frameworks that are more meaningful to them, these participatory methods can result in data they can use to improve their work.

Approaches whereby monitoring and/or evaluation data is collected, analyzed and used *to improve interventions* by community members and/or by program implementers have been relatively scarce within OVC programs. Recognizing the need to improve the quality of services provided to children and their families, PEPFAR initiated the OVC Quality Initiative (QI) (DiPrete Brown, 2008), implemented in partnership with the University Research Co., LLC. As explained in the QI facilitators guide, "*routine indicators have not sufficiently captured the quality of those [OVC] services or whether or not you made a difference for the children served.*" A pilot project was conducted in

Ethiopia by Save the Children/US to examine whether developing and implementing service standards would result in improved programming (Save the Children, 2009). A process was initiated to collect and analyze data at the local level that examined current interventions and informed program modifications. QI teams in the community were encouraged to implement and assess innovative solutions to barriers or gaps in services that they identified through their data collection. CBOs were encouraged to document their work, so that they are better able to understand and learn from their progress, as well as to identify remaining gaps and barriers that needed to be addressed. Monitoring systems were initiated to provide ongoing information about the situation of children participating in the program. For example, information on children's school attendance and their academic performance was collected during home visits, enabling the volunteers to detect when children were having trouble with school and to respond according to agreed-upon standards.

The Firelight Foundation provides another example of M&E efforts focused on program improvement. Recognizing the tension between donor-required data and the importance of using M&E systems to improve program quality, the Firelight Foundation initiated M&E training and support activities that focus on building local organizations' ability and confidence to monitor and evaluate their own work, rather than reporting on a specific data set for Firelight. In an attempt to foster more meaningful M&E efforts among program implementers at the community-level, Firelight supports their grantees to focus their M&E efforts on the following questions:

- o What are we trying to achieve? *(goals)*
- o Where do we want to get to? *(objectives)*
- o How are we going to get there? *(programs, activities)*
- o What do we expect to happen along the way? (*results - output/outcome/impact*)

o How do we know we are on the right road? *(indicators, baseline, targets)*

Firelight aimed for their grantees to: 1) more clearly identify their own strategies and intended outcomes of their work; 2) pair monitoring with ongoing, day-to-day work; 3) have ownership of their monitoring framework, tools, and procedures; 4) share what they have learned with their local communities and stakeholders; and most importantly, 5) make changes in the organizations' programs and activities based on what they learn from the results of their M&E efforts. This M&E training approach for local organizations succeeded in transforming the perception of M&E from an externally-imposed burden for participating CBOs to a tool for empowerment in program adaptation and organizational development (see Box 2). At the same time, this necessitated a transformation in the perspective of the donor, as well as the grantee. Initially, it was a

> **Box 2. Reactions by community-based organizations to Firelight's M&E training**
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> *"I learnt to think about more than outputs – that it is important to think about the 'So what?' of what we do."*
>
> *"I learnt how to use the information to manage the programme, and that monitoring is not only about policing and reporting."*
>
> *"We need to monitor in order to be able to share our success stories and learn from our mistakes!"*

challenge to align the donor's need for *accountability* with its commitment to foster meaningful M&E among its grantees in a way that results in *better programming*. In fact, Firelight eventually realized that grantees were already using informal M&E "systems" to monitor their work and hold themselves accountable in a way that can be tapped by donors to assure that funds are being used appropriately.

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Box 2. Reactions by community-based organizations to Firelight's M&E training

An example of how Firelight's local partners are devising their own M&E efforts is

described as follows, *"In Tanzania, a group of grandmothers known as the Tumaini Women mobilized themselves to improve reproductive health and increase birth registration in their communities. They found that they were less successful in one particular location, so they went door-to-door and took a survey to dig into the root causes. They found that there were economic barriers explaining the relatively low uptake of their messages. Thus, they changed their approach and added a component addressing economic strengthening."* Another example of monitoring results that were used to improve service delivery came from the Lesotho Save the Children, a local NGO. After staff members received M&E training through Firelight, the NGO began to track and analyze cases of abused children needing assistance in their catchment areas, by location and frequency. When the organization identified an increase in child neglect cases from a particular locality, implementation plans were modified and that area was targeted with community awareness activities that focused on abuse prevention and treatment.

World Vision highlights another example of the use of community level data to improve programs from one of the local community care coalitions in Uganda that was mobilized to care for children. At the village level, home visitors report weekly to the village coalition and a monthly report is sent to the parish where the data is aggregated and shared with stakeholders and other members of the community. Every six months, the executive synthesizes the information into a report that is shared with the sub-county leadership, the Area Development Program, and other community stakeholders. The executive is able to clearly give a picture of the situation at sub-county level and is able to document urgent measures that are needed. The community has used the information

to develop their community maps, stakeholder analysis charts, and problem and solution trees. "*We have used our information to lobby local leaders at sub-county levels to consider OVC issues in the development plans and this has been taken care of*" (World Vision, 2008).

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Box 3. Challenges to harnessing the power of M&E to improve OVC programming

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o   OVC program implementers often receive funds from more than one donor, each imposing different M&E frameworks and requirements for their own accountability systems. It is often *difficult to combine M&E frameworks from different donors.*

o   Concentrated emphasis by donors to collect data on the number of beneficiaries receiving services ("breadth" or coverage) leads to *gaps in data that is collected to assess "depth" or quality* of the services being provided to children and their households.

o   Externally-driven M&E and indicators, to the point where the burden of time and resources required for M&E can detract from organizations' core work, often overwhelm organizations. Immersion in this type of M&E makes it difficult for NGOs/CBOs to perceive value in implementing new systems that could be useful to the organization and its programs

o   Donors often require program plans from the time of the proposal submission and do *not allow for modification* of activities to respond to lessons learned as a result of monitoring and evaluation efforts.

o   The nature of *short-term project funding cycles* is not congruent with long-term support needed to support years of childhood. Desired outcomes and impacts will require long-term support and follow-up.

o   When conducting an evaluation that requires data from a comparison group, there are *ethical implications* to collecting baseline and follow-up information from a group of vulnerable children and their households that the intervention does not intend to reach in order to compare their condition with those who have received the benefits of the intervention (Schenk and Williamson, 2005).

o   Indicators from different programs are often defined and collected in different manners, making it *difficult to aggregate and compare data from different programs*. (At global level, there have been efforts to harmonize indicators in order to aggregate data across countries and regions.)

Ideally, systems for collecting information and using the data to improve programs would be introduced as an intrinsic part of the intervention upon the initiation of the program activities, rather than attempting to add them once programs have begun. To do so would require a commitment of time and resources by donors, as well as implementers. These systems would need to provide the donors with data for the purpose

of a*ccountability,* while at the same time collecting data that can be used by local implementers to identify and overcome gaps and challenges. The challenges OVC programs and their donors face in actually implementing M&E frameworks to address both *accountability* and *improved programming* remain significant (see Box 3). Many of these challenges are the same as those facing other development programs and have been discussed elsewhere. Some are relatively easy to mitigate with foresight and planning. Others are more difficult, but those challenges can also be overcome with the necessary amount of time, funds, creativity, and perseverance.

Conclusion

Decision makers are regularly faced with the tension between spending a portion of scarce resources on M&E versus using more funds for program implementation. In fact, the value of M&E remains unclear to donors and to implementers when M&E processes take on a "life of their own" and fail to contribute to the original objectives of the program. When organizations fail to collect data that is linked to improving their programs, the resources spent on M&E - including human resources that are scarce and often over-worked - are perceived as "money down the drain". Until and unless M&E is more clearly linked with improving interventions, this debate will continue among stakeholders. On the other hand, when M&E results in data that is, in fact, used to improve programming, the value of spending resources on M&E to maximize the impact of resources will be self-evident to stakeholders focused on the well-being of children and their families.

M&E can - and must be - consistently and correctly harnessed to increase the

effectiveness of programs in order to optimize the use of scarce resources in supporting

vulnerable children, their families, and their communities.

Notes

1. "OVC" is an acronym for orphans and other vulnerable children. Though these words do not explicitly refer to vulnerability due to HIV or AIDS, in the context of programs that supported by HIV/AIDS funding, the term has become associated with children who are affected by HIV and AIDS. This is especially the case when used as an adjective, such as in the term, "OVC programs."
2. These efforts have been spearheaded by the UNAIDS inter-agency task team (IATT) on Children and HIV and AIDS, working group on Monitoring and Evaluation as described by Rachel Yates: www.irishaid.gov.ie/uploads/Rachel_Yates_IATT_presentation.ppt

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