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Planning, Monitoring and Evaluation (PME)

Years of experience with evaluations revealed that, in many cases, the weaknesses of projects or programmes had included a lack of planning or documentation of planning, and a failure to incorporate appropriate monitoring and assessment. Numerous evaluation reports, for instance, read like a reconstruction of planning not explicitly realised, and of inadequate monitoring and assessment. Consequently, in 1992 the Church-based agencies Bread for the World, the Protestant Association for Cooperation in Development (EZE, now EED) and MISEREOR launched what they termed the "PME dialogue process" with their partners. This was designed to harness the wealth of experience with PME methods on hand in the South, instead of propagating standardised solutions. To this end, during the first phase the practical PME experience of selected partners in Asia, Africa and Latin America was surveyed and documented by local experts, after which the insights gained were subjected to in-depth analysis in workshops. A second phase followed in which organisations in the South were encouraged to employ, and further develop, locally-developed methods and instruments for planning, monitoring and evaluation.

Key workshops were held in this connection from 1995 – 1998, in Solo (Indonesia), Cochabamba (Bolivia), Abidjan (Ivory Coast), Harare (Zimbabwe) and Benguela (Angola). The debates generated and documents produced at these workshops, however, no longer focused on methods, their diversity and cultural adaptation, but on PME as a mindset to be studied and acquired, and on its key contribution to [institutional learning](#). At these workshops, the roles played by different partners took centre stage. In this situation it became clear that the customary distinction – between one partner as donor, and one partner as project implementing agency – needed to be abandoned in favour of equal roles for the respective partners. This places themes such as joint strategic development, and joint responsibility for impact monitoring and assessment, at the top of the agenda. That "PME dialogue process" has determined how we deal with the theme in our cooperation with development organisations in the South: we do not seek standardised [PME methods and instruments](#) prescribed from outside, but learning processes in the South and in the North that enable actors to apply PME expediently.

These learning processes must incorporate the following aspects:

No specific PME methodology is prescribed; the individual organisations endeavour to engage in strategic thinking and flexible planning, incorporate monitoring and assessment as well as facilitation into the planning phase, and systematically utilise evaluations as an opportunity for learning and for "intelligent" accountability towards the final beneficiaries.

From their position "in the back seat", partners in the North must make themselves more aware of their own information requirement, and convey this as clearly as possible to their partners in the South. Partners in the South must do likewise and, to the extent that they wish to avail themselves of methodological support, Church-related agencies in the North can act as "hubs of information" and "information brokers", disseminating the experiences of individual partners and practical lessons learned.

Finally, an appropriate PME system must focus on the capacities available both in the South and in the North, and be integrated as closely as possible into the culture and working practices of an organisation.