

## Values-Based Monitoring and Evaluation (VBME): Principles, Practices and Process

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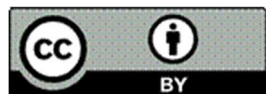
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## **Values-Based Monitoring and Evaluation (VBME): Principles, Practices and Process**

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### **ABSTRACT**

Values-Based Monitoring and Evaluation (VBME) is critical for the 21st century because it ensures policies, programs, projects and related initiatives are not only effective but also ethical and responsive to the needs of people and communities. It fosters accountability and transparency by centering the voices of stakeholders, leading to improved decision-making, better policy and project outcomes, and a more profound, lasting impact. By embedding values into monitoring and evaluation, VBME provides the necessary framework to deliver on promises and demonstrate a commitment to genuine change in a world facing complex challenges. However, despite VBME's importance, it has not been comprehensively conceptualized and researched in the evaluation literature. This paper provides an initial conceptual analysis of Values Based Monitoring and Evaluation, and discusses its key principles, practices and process.

**Keywords:** values-based monitoring and evaluation (VBME), values based monitoring (VBM), values based evaluations (VBE), organizational values, monitoring and evaluation (M&E).

## **INTRODUCTION**

Monitoring and evaluation (M&E) is fundamentally a values-based enterprise (Kotschy, de Villiers, Hiestermann, Mvulane, Raven & Soal, 2025; Averill, 2021; Burford, Velasco, Janoušková, Zahradnik, Hak, Podger & Harder, 2013). While M&E involves systematic, technical processes of data collection and analysis, the entire framework is built upon and guided by a set of core ethical principles and values that influence its design, implementation, and use of findings (Burford, et al., 2013; Averill, 2021; Kotschy, et al., 2025). A core value of M&E is promoting accountability to stakeholders, including donors, governments, and especially program beneficiaries (Ospina, Cunill-Grau & Maldonado, 2021; O’Leary, 2017; Wongtschowski, Oonk & Mur, 2016). This requires transparent reporting of findings, both positive and negative, to show how resources are used and what results were achieved.

While the field of monitoring and evaluation (M&E) inherently involves values such as accountability and learning, there is limited explicit, dedicated conceptual guidance on a formal "values-based M&E" framework in the general literature (Burford, Velasco, Janoušková, Zahradnik, Hak, Podger & Harder, 2013). M&E principles are typically discussed in terms of technical application, utility, and ethics, rather than as a distinct values-based methodology. Developing and researching Values-Based Monitoring and Evaluation (VBME) is important because it ensures that policies, programs, projects and organizations not only achieve their set objectives but also align their actions with a core set of ethical and social principles, such as equity, transparency, and social justice (Averill, 2021; Rich, 2009; Pruzan, 1998; Blaser Mapitsa & Khumalo, 2020). This M&E approach moves beyond simply measuring quantifiable results to understanding how change is happening and whether that change is contributing to the common good. A conceptual analysis of values-based education (VBE) is required in the Monitoring and Evaluation (M&E) literature primarily because the lack of a clear, common definition and operational framework for "values" makes it difficult to design effective and reliable M&E systems.

### **Conceptualizing Values Based Monitoring and Evaluation**

Conceptualizing Values-Based Monitoring and Evaluation (VBME) presents challenges, yet proposing a clear definition promotes both its practice and research (Averill, 2021; Syafika & Marwa, 2024; Podger, Hoover, Burford, Hak & Harder, 2016). The primary challenges stem from the subjective nature of "values," which can lead to conceptual ambiguity, data collection difficulties, and the challenge of aligning diverse stakeholder perspectives (Kotschy, de Villiers, Hiestermann, Mvulane, Raven & Soal, 2025; Pruzan, 1998; Kotschy, de Villiers, Hiestermann, Mvulane, Raven & Soal, 2025). Values are inherently qualitative and context-dependent, making it difficult to create universally agreed-upon, objective definitions and measurable indicators (Rawluk, Ford, Anderson & Williams, 2019; Tsirogianni & Gaskell, 2011; Rosser, 2008). Translating abstract values (e.g., social justice, equity, and empowerment) into concrete, measurable data requires sophisticated methodologies, often blending quantitative and qualitative approaches, which can be resource-intensive and complex to analyze.

Despite these challenges, a clear definition of values-based M&E is crucial for advancing the M&E field (Averill, 2021; Syafika & Marwa, 2024; Podger, et al., 2016). A definition provides a common understanding of what VBME aims to achieve, establishing clear objectives and boundaries for its application. It offers a roadmap for practitioners to design and implement M&E systems that explicitly integrate ethical considerations and social equity principles, moving beyond a narrow focus on traditional performance metrics like outputs and efficiency (Averill, 2021; Syafika & Marwa, 2024; Podger, et al., 2016).

A clear definition and framework allow for greater transparency in how value judgments are made (Gopichandran & Krishna, 2013; Fischhoff & Furby, 1988), enabling stakeholders to track progress against agreed-upon social and ethical goals and holding organizations accountable for their stated values. A defined concept provides a foundation for academic inquiry, encouraging the development of new methodologies, tools, and best practices tailored to assessing value-driven interventions. A clear definition of values, while difficult to formulate, transforms Values-Based Monitoring and Evaluation from an abstract ideal into a structured M&E approach that is both feasible for practical application and robust enough for rigorous study.

We define Values-Based Monitoring and Evaluation (VBME) as an M&E approach that goes beyond standard metrics to include the assessment of values, ethics, and principles in policies, programs, projects and related initiatives. VBME is an approach where the values relevant to a specific context, project, or community guide the entire M&E process. Unlike traditional M&E which often focuses purely on objective, quantitative results, VBME integrates subjective, qualitative aspects to provide a more holistic assessment.

Values-Based Monitoring and Evaluation (VBME) is not a single, rigid methodology but a flexible framework that integrates qualitative and quantitative methods to evaluate how well an initiative aligns with and promotes a defined set of values, such as equity, sustainability, participation, or human rights (Averill, 2021; Syafika & Marwa, 2024; Podger, et al., 2016).. While traditional M&E often focuses on efficiency and immediate outcomes (e.g., "how many people were trained?"), VBME looks at the quality and ethical implications of the process and results ("was the training process inclusive and equitable?"). It goes beyond easily quantifiable metrics (like number of people served) to understand changes in attitudes, beliefs, motives, and behaviors, which often require more time-consuming qualitative data collection and analysis. Instead of just asking, "How many services were provided?", a values-based M&E approach might ask: "To what extent did the service delivery process empower the most marginalized members of the community, consistent with our value of equity?"

### **Principles of Values Based Monitoring and Evaluation**

M&E principles are the foundational rules that guide the systematic collection, analysis, and use of information to assess the performance of a policy, program or project, enabling evidence-based decision-making, accountability, and organizational learning (Kabonga, 2018; Kusek & Rist, 2004; Sithomola & Auriacombe, 2019). The principles of Values-Based Monitoring and Evaluation (VBME) are a set of core tenets that guide the M&E practice to ensure it is ethical,

relevant, and effective in achieving not just tangible results, but also broader social and ethical goals. These principles go beyond typical M&E to embed specific values into the M&E process.

Values-Based Monitoring and Evaluation (VBME) centers on principles like stakeholder participation, accountability, and evidence-based decision-making, while also incorporating ethical considerations such as protecting privacy and ensuring rights. VBME assesses policy, program or project success based on defined objectives and indicators, using data to make judgments about the intervention's effectiveness, efficiency, sustainability, and overall impact, and reporting findings transparently.

***Stakeholder Participation:*** Stakeholder participation is a fundamental principle of Values-Based Monitoring and Evaluation (Breuer & Lüdeke-Freund, 2019; Anderson, 1997; Taut, 2008; Tengan & Aigbavboa, 2017), especially when it comes to ensuring that projects are relevant and successful. VBME encourages the involvement of all relevant parties, including community members, government agencies, NGOs, and consumers, throughout the project lifecycle. VBME approach recognizes that involving stakeholders in the M&E process from the beginning leads to better project design, improved decision-making, increased transparency, and a stronger sense of ownership among participants. Instead of passively receiving information, stakeholders are the primary actors who collect, analyze, and interpret data, and are responsible for generating recommendations for change.

Stakeholder participation is a core principle of Values-Based Monitoring and Evaluation (VBME) because it directly integrates diverse perspectives, needs, and expectations into the process, thereby enhancing the relevance, credibility, transparency, and ultimate sustainability of the evaluation and the project itself (Amin, Scheepers & Malik, 2023; Hermans, Haarmann & Dagevos, 2011; Tengan & Aigbavboa, 2017). VBME, by definition, focuses on the "values" and principles important to a policy, program or project. Active stakeholder involvement ensures that the monitoring and evaluation questions, criteria, and indicators genuinely reflect the values, priorities, and local realities of those most affected by the project (beneficiaries, local communities, etc.). This prevents the imposition of external, "top-down" metrics that may not be locally relevant.

Stakeholders possess valuable local knowledge and insights into the context, social dynamics, and cultural nuances that external evaluators might miss (Amin, Scheepers & Malik, 2023; Hermans, Haarmann & Dagevos, 2011; Tengan & Aigbavboa, 2017). Incorporating this knowledge into the M&E process leads to more informed, contextually relevant, and effective decisions, allowing for timely adjustments and adaptations (adaptive management). An inclusive process inherently increases transparency, as stakeholders understand how information is collected, analyzed, and used. This open dialogue helps build mutual trust between the implementing organization and the community, which is particularly important in sensitive or contentious projects.

When stakeholders are involved in shaping and conducting the evaluation, they are more likely to trust and accept the findings and recommendations (Amin, Scheepers & Malik, 2023; Hermans, Haarmann & Dagevos, 2011; Tengan & Aigbavboa, 2017). This "social validation" is crucial for ensuring that the results are seen as legitimate and reliable by all parties, including decision-makers and the community. Participation builds a sense of ownership and accountability among

stakeholders. When people feel their input is valued and influences decisions, they become more invested in the project's success and the implementation of necessary changes or improvements. This empowerment is central to sustainable development outcomes (Amin, Scheepers & Malik, 2023; Hermans, Haarmann & Dagevos, 2011; Tengan & Aigbavboa, 2017).

***Equity and Social Justice:*** Equity and social justice are core principles of Values Based Monitoring and Evaluation (Stone, 2025; Wolfe, Long & Brown, 2020; Kotschy, de Villiers, Hiestermann, Mvulane, Raven, & Soal, 2025). This approach moves beyond traditional metrics to ensure that the perspectives, needs, and aspirations of all stakeholders, especially marginalized and vulnerable communities, are integrated into the M&E process and outcomes. VBME is explicitly built on a value framework that determines the standards of acceptability in development work. The central values often include serving the disadvantaged, promoting empowerment, and changing society to be more just (Stone, 2025; Wolfe, Long & Brown, 2020; Kotschy, de Villiers, Hiestermann, Mvulane, Raven, & Soal, 2025). A value-driven evaluation approach actively seeks to include the voices of marginalized communities and individuals throughout the evaluation process, from designing the M&E questions to interpreting the findings. VBME ensures that M&E is not a value-neutral, technical exercise but a conscious effort to promote a more just and fair society by "valuing the values" of the people involved and affected by the policies, programs, projects and related interventions.

Equity and social justice are paramount in Values Based Monitoring and Evaluation (VBME) as they ensure that M&E processes and outcomes are ethical, fair, and effective in addressing systemic inequalities. (Hayvon, 2024; Mertens, 2023; Buckton, Fazey, Ball, Ofir, Colvin, Darby & van Mierlo, 2025). They transform M&E from a mere performance-tracking tool into a mechanism for systemic change and empowerment of marginalized populations. A VBME approach guided by these principles prioritizes the experiences and needs of historically sidelined groups, rather than just the majority or most visible populations (Hayvon, 2024; Mertens, 2023; Buckton, et al., 2025). This ensures that interventions address the specific causes of harm and exclusion. VBME explicitly recognizes and addresses power dynamics and inequities within social systems, programs, and even M&E practices themselves. This involves promoting the authentic participation and leadership of equity-deserving groups in decision-making processes, which is crucial for sustainable change (Hayvon, 2024; Mertens, 2023; Buckton, et al., 2025).

By revealing and addressing embedded biases and structural inequalities, equity and social justice principles facilitate transformative behavioural and systemic changes, rather than just incremental improvements (Hayvon, 2024; Mertens, 2023; Buckton, et al., 2025). Integrating these values strengthens accountability to the population, not just to donors, by making the process and results transparent. This builds trust and ownership among local communities, who can use M&E evidence to demand their rights from duty-bearers. Equity and social justice are essential for VBME to be a force for positive, inclusive, and lasting change in the world (Hayvon, 2024; Mertens, 2023; Buckton, et al., 2025).

***Transparency and Accountability:*** Transparency and accountability (O'Leary, 2017; Kusek & Rist, 2004; Mahmoud Saleh & Karia, 2024) are core principles of Values Based Monitoring and Evaluation (VBME). Transparency and accountability are fundamental to Values Based

Monitoring and Evaluation (VBME) because they build trust and credibility among stakeholders, ensure that activities align with ethical standards and public interest goals, and drive continuous learning and improved performance (O’Leary, 2017; Kusek & Rist, 2004; Mahmoud Saleh & Karia, 2024). Transparency in VBME involves open and clear communication about evaluation processes, data, decisions, and findings to all relevant stakeholders. Openness about operations and performance fosters confidence among partners, beneficiaries, and the public, which is crucial for the legitimacy of the evaluation and the program it assesses. Transparent processes allow stakeholders to scrutinize the methods used and conclusions drawn in evaluations, ensuring the integrity and reliability of the data and findings (O’Leary, 2017; Kusek & Rist, 2004; Mahmoud Saleh & Karia, 2024).

Accountability in VBME means that individuals and organizations are responsible for their actions, decisions, and the results of their programs, and are answerable to relevant stakeholders (Wongtschowski, Oonk & Mur, 2016; Kabonga, 2018; Ospina, Cunill-Grau & Maldonado, 2021). Accountability mechanisms ensure that the VBME process and the projects being evaluated adhere to the core values, ethical principles, and stated objectives of the organization or partnership. By establishing clear expectations, roles, and performance targets, accountability motivates teams to achieve desired outcomes (Wongtschowski, Oonk & Mur, 2016; Kabonga, 2018; Ospina, Cunill-Grau & Maldonado, 2021). When performance is measured and reviewed, it encourages effective decision-making and a focus on achieving positive social impacts.

Accountability goes beyond simply providing information (answerability); it involves having mechanisms for applying sanctions or making corrections if performance standards are not met (O’Leary, 2017; Kusek & Rist, 2004; Mahmoud Saleh & Karia, 2024). This ensures that a lack of performance or a deviation from values has consequences. In essence, transparency provides the necessary information for accountability to function effectively, and together they form the bedrock of ethical practice, good governance, and effective, values-driven outcomes in M&E.

***Holistic and Systems Thinking:*** Holistic and Systems Thinking are core principles of Values Based Monitoring and Evaluation (Wotela, 2017; Kádárová, Kalafusová & Durkáčová, 2014; Hummelbrunner, 2011). VBME uses holistic and systems thinking to ensure that evaluations are relevant, useful, and account for the complex, value-laden realities of interventions, especially in dynamic or fragile contexts.

VBME specifically explores and incorporates the values, perspectives, and interests of all stakeholders to gain a comprehensive understanding of the project and its context (Amin, Scheepers & Malik, 2023; Hermans, Haarmann & Dagevos, 2011; Tengan & Aigbavboa, 2017). This necessitates a holistic perspective that considers the whole system and how its various components and external factors (cultural, political, economic, and environmental) interact. VBME, through a systems thinking lens, recognizes that the components of a program are interconnected, and changes in one area can have ripple effects throughout the system and on different stakeholders (Stroh, 2015; Canty-Waldron, 2014). The approach emphasizes incorporating diverse stakeholder perspectives, which often conflict, to gain a more complete picture of the system's functioning. This is a core part of valuing the "soft" or intangible values (like culture, well-being, and social justice) that traditional M&E might overlook.

Systems thinking in evaluation involves making explicit "boundary judgments" to define the scope of the system being evaluated and its interactions with the environment, ensuring that the context is adequately understood and considered (Gates, 2016; Ulrich, 2022; Torres-Cuello & Pinzon-Salcedo, 2022). Holistic thinking moves beyond focusing solely on individual parts or symptoms to understanding the big picture and how all parts work together, which is essential for sustainable and equitable outcomes.

**Evidence-Based Decision Making:** Evidence-based decision making (Del Fabbro, Corbella & Taschieri, 2017; Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012) is a core principle of Values Based monitoring and evaluation (VBME). Evidence-Based Decision Making is crucial to Values Based Monitoring and Evaluation (VBME) because it provides the objective data and rigorous analysis necessary to ensure that program strategies are effective in achieving desired outcomes in a manner consistent with core values (Del Fabbro, Corbella & Taschieri, 2017; Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012). This integration ensures decisions are both principled and impactful.

In a VBME framework, evidence and values are considered complementary components (sometimes referred to as the 'two-foot principle'). EBDM provides the robust data needed to understand the effectiveness of an intervention, while the "values-based" aspect ensures that the unique preferences, concerns, and expectations of stakeholders are also integrated into the decision-making process. The evidence helps ensure decisions are effective, while values ensure they are relevant and ethical within the specific context.

VBME operates on a philosophy of continuous learning and improvement (often called responsive feedback). Evidence provides the feedback loop necessary to learn from both successes and failures in real-time (Detrich & Slocum, 2012; Del Fabbro, Corbella & Taschieri, 2017; Baba & HakemZadeh, 2012). This allows for agility and adaptivity, enabling managers to make timely course corrections and refine their strategies as the context changes. The findings from evidence-based evaluations are vital for informing the design and implementation of future programs and policies. This helps in the efficient allocation of resources by channeling investment into interventions that have a proven track record of success, thus avoiding wasted time and money on ineffective solutions (Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012).

VBME recognizes that while evidence is crucial for determining what works, values are essential for deciding what is most appropriate or important in a given context (Gorrdard, Colloff, Wise, Ware & Dunlop, 2016; Keeney, Von Winterfeldt & Eppel, 1990). The two are inseparably linked for effective and ethical practice. M&E decisions based solely on intuition, personal opinion, or anecdotal experience can be subject to various biases (e.g., confirmation bias, authority bias). Evidence based decision making requires the conscientious use of the best available evidence from multiple sources, which introduces an objective, fact-based standard into the decision-making process, ensuring decisions are fair and impartial (Del Fabbro, Corbella & Taschieri, 2017; Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012).

The core idea is that the best decisions are made by integrating the best available evidence with the values, preferences, and circumstances of the stakeholders involved (Del Fabbro, Corbella &



Taschieri, 2017; Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012). Values-based practice (VBP) provides a framework for balancing diverse and sometimes conflicting values among stakeholders in a democratic and inclusive way. The evidence provides the factual basis within which these values-based discussions and decisions can take place (Baba & HakemZadeh, 2012; Spencer, Detrich & Slocum, 2012). Using clear data and evidence to inform decisions creates a transparent process, making it easier to justify actions to stakeholders, including beneficiaries, partners, and donors. This transparency fosters trust and demonstrates that an organization is using resources effectively and responsibly to achieve its stated values and goals (Del Fabbro, Corbella & Taschieri, 2017; Baba & HakemZadeh, 2012).

Evidence-based decision making helps determine "what works" by assessing the actual outcomes and impact of interventions (Sanderson, 2003; Spencer, Detrich & Slocum, 2012). By systematically tracking progress and evaluating results against specific indicators, organizations can identify successful strategies and areas for improvement, allowing for targeted adjustments to maximize positive impact.

***Purpose-Driven and Goal Orientation:*** Purpose-Driven and Goal Orientation is a fundamental principle of effective Monitoring and Evaluation (Ito, 2023; Flanding & Grabman, 2022; Hong, Chennatuserry, Deng & Hopkins, 2021), including approaches like Values Based Monitoring and Evaluation (VBME). In Values Based Monitoring and Evaluation (VBME), purpose-driven and goal orientation is a critical principle because it ensures that all activities and assessments are fundamentally aligned with the core values and intended outcomes of the initiative. (Ito, 2023; Flanding & Grabman, 2022; Hong, Chennatuserry, Deng & Hopkins, 2021). This alignment provides a moral and strategic compass, moving M&E beyond mere compliance to a process that drives meaningful, values-aligned impact. A clear purpose and goal orientation provide clarity about what the program is trying to achieve and how success will be measured. This helps define specific, measurable, achievable, relevant, and time-bound (SMART) indicators that are directly linked to the desired outcomes, ensuring data collection is focused and meaningful (Ito, 2023; Flanding & Grabman, 2022; Hong, Chennatuserry, Deng & Hopkins, 2021).

Values serve as critical guides in decision-making processes. When M&E is purpose-driven, findings are used to inform strategic decisions that align with the organization's deepest beliefs and long-term goals, rather than just short-term performance metrics (Ito, 2023; Flanding & Grabman, 2022; Hong, Chennatuserry, Deng & Hopkins, 2021). When individuals understand the 'why' behind their actions and see their work contributing to a larger, values-aligned mission, it instills a greater sense of purpose and fulfillment. This intrinsic motivation is a powerful driver of engagement, commitment, and sustained effort, leading to higher performance and retention rates (Ito, 2023; Flanding & Grabman, 2022; Hong, Chennatuserry, Deng & Hopkins, 2021).

Goal orientation provides clear and objective measures of progress, which is essential for ensuring accountability to stakeholders, including beneficiaries, funders, and the public (Wellens & Jegers, 2014; Benjamin, 2013). Consistently demonstrating that actions are aligned with stated values and goals builds credibility and trust among all involved parties. A goal orientation, particularly one focused on learning goals, encourages the seeking and use of feedback (both positive and negative) for self-improvement and adaptation (Wellens & Jegers, 2014; Benjamin, 2013). This fosters a

culture of continuous learning and improvement, allowing the initiative to adapt strategies in real-time to maximize impact and overcome challenges. By focusing on the results and outcomes most relevant to the core purpose, organizations can ensure that resources (financial, human, etc.) are allocated efficiently to areas of greatest need and priority. This maximizes the impact of the efforts with the given resources (Wellens & Jegers, 2014; Benjamin, 2013).

All M&E systems, regardless of their specific approach (e.g., results-based or values-based), are fundamentally concerned with assessing progress towards specified objectives and desired results (Averill, 2021; Brockwell, 2019; Picciotto, 2020). The foundation of any M&E plan, including VBME, is the establishment of clear, specific, measurable, achievable, relevant, and time-bound (SMART) objectives and goals. These goals provide a clear direction for what the program aims to accomplish and a benchmark against which progress can be measured (Averill, 2021; Brockwell, 2019; Picciotto, 2020).

***Adaptability and Continuous Improvement:*** Adaptability and Continuous Improvement are core principles of Values Based Monitoring and Evaluation (D'Brot, & Brandt, 2024; Mahmoud Saleh & Karia, 2024; Morris & Lawrence, 2010). These principles transform M&E from a simple reporting requirement into a dynamic, learning-oriented management tool that helps organizations navigate complex environments and ensure their work is consistently effective and aligned with their core values (D'Brot, & Brandt, 2024; Mahmoud Saleh & Karia, 2024; Morris & Lawrence, 2010).

In Values Based Monitoring and Evaluation (VBME), Adaptability is the principle of intentionally designing programs and M&E systems to be flexible, allowing for strategic adjustments in response to new information, changing contexts, and unexpected challenges while still pursuing core goals (Inisha & Elly, 2022; Morris & Lawrence, 2010; Khan, 1998). Continuous Improvement is the linked principle that involves the ongoing, systematic effort to learn from monitoring and evaluation data and use those insights to make incremental enhancements to processes, strategies, and overall effectiveness (Inisha & Elly, 2022; Morris & Lawrence, 2010; Khan, 1998). Adaptability in VBME goes beyond mere reaction; it is a proactive approach to managing under conditions of uncertainty. Continuous Improvement transforms M&E from a mere reporting requirement into a core management function that drives ongoing refinement (Inisha & Elly, 2022; Morris & Lawrence, 2010; Khan, 1998).

Adaptability and continuous improvement are essential to Values Based Monitoring and Evaluation (VBME) because they allow a program to remain relevant, effective, and aligned with its core values in a dynamic environment (Qalavand, 2025; Webster & Cokins, 2020; Kotjomela, 2022). These principles involve an intentional approach to making decisions and adjustments based on new data, rather than adhering rigidly to an outdated plan (Qalavand, 2025; Webster & Cokins, 2020; Kotjomela, 2022). VBME uses continuous feedback loops to inform this adaptive management, ensuring that activities remain aligned with desired outcomes. VBME emphasizes that the evaluation process must be relevant to the specific context and the values of the stakeholders involved. Adaptability ensures that M&E approaches and indicators can be tailored or adjusted to meet specific needs and cultural contexts, rather than imposing a "one-size-fits-all" structure (Qalavand, 2025; Webster & Cokins, 2020; Kotjomela, 2022).

While traditional M&E often focuses on upwards accountability to donors, VBME, through continuous improvement, integrates learning and transparency (Masilo, 2024; Mahmoud Saleh & Karia, 2024; Khan, 1998). Regularly tracking and sharing metrics (KPIs) helps all stakeholders see the direct impact of efforts, building trust and shared responsibility. Continuous improvement is fundamentally about using data and evidence to inform reflective practices and make smarter decisions. VBME uses systematic data collection and analysis to identify what is working, what is not, and why, fostering a culture of learning rather than a punitive one (Masilo, 2024; Mahmoud Saleh & Karia, 2024; Khan, 1998). The ongoing process of questioning the status quo and seeking better ways of doing things leads to superior products, services, and processes. In VBME this translates to continually enhancing program quality and ensuring that initiatives achieve their intended impact and better meet beneficiary needs.

### **Values Based Monitoring and Evaluation Practices**

Monitoring and Evaluation (M&E) practices are systematic processes for tracking project progress and assessing its success through continuous monitoring and periodic evaluations (Kabonga, 2018; Crawford & Bryce, 2003; Inisha & Elly, 2022). They involve activities like planning, data collection, and analysis, reporting, and using findings to make informed decisions, improve project performance, and ensure accountability to stakeholders. M&E practices are crucial for project success because they improve decision-making, ensure resource efficiency, and promote accountability and transparency. M&E provides data-driven insights to learn from successes and failures, adapt to new circumstances, and demonstrate impact to stakeholders and donors. This leads to continuous improvement and helps projects stay on track to achieve their goals (Kabonga, 2018; Crawford & Bryce, 2003; Inisha & Elly, 2022).

Understanding VBME practices enables a more holistic assessment of success, ensuring that interventions are not just efficient, but also meaningful and aligned with shared human and social goals (Qalavand, 2025; Zappalà, 2020; Asri & Bakar, 2025; King, 2021). Understanding the practices of Values Based Monitoring and Evaluation (VBME) is crucial because it helps ensure that projects not only achieve their technical objectives but also align with core ethical and social principles, leading to more relevant, equitable, sustainable, and impactful outcomes (Qalavand, 2025; Zappalà, 2020; Asri & Bakar, 2025; King, 2021). VBME practices, especially participatory approaches, involve stakeholders (including beneficiaries) in defining success and collecting feedback. This engagement builds trust, ensures the program is sensitive to local needs, and fosters a sense of ownership among the community, which is key to sustainability (Qalavand, 2025; Zappalà, 2020; Asri & Bakar, 2025; King, 2021).

***Developing a Values Based Monitoring and Evaluation (VBME) Plan:*** Developing a Values Based Monitoring and Evaluation (VBME) plan is considered a core practice within the VBME approach. This practice is part of a broader methodology that helps groups and organizations to understand and reflect on their shared values and use them to guide their entire monitoring and evaluation system (Sisimayi, Ngwenya & Mabwe, 2024; Wagner & Durr, 2006; Van Ongevalle, Huyse, Temmink, Boutyilkova & Maarse, 2012). This is a crucial step where the values identified are translated into a systematic and structured plan for assessment. This plan outlines how data will be collected, analyzed, and used, ensuring all M&E activities align with the stated values and

the intended outcomes related to them (Sisimayi, Ngwenya & Mabwe, 2024; Wagner & Durr, 2006; Van Ongevalle, Huyse, Temmink, Boutylkova & Maarse, 2012).

A values-based Monitoring and Evaluation plan is a framework for a project that assesses its success not only by its stated outcomes but also by how it aligns with the project's core values and principles (Sisimayi, Ngwenya & Mabwe, 2024; Wagner & Durr, 2006). It is a strategic document that guides the collection, analysis, and use of data to understand if a program is achieving its objectives while also adhering to its fundamental principles, like fairness, equity, and respect for beneficiaries. The plan explicitly links program goals with its underlying values, ensuring the project's actions and impact reflect its mission (Sisimayi, Ngwenya & Mabwe, 2024).

***Developing Values Based Theory of Change:*** Developing a Values Based Theory of Change (VBToC) is a core practice for values-based monitoring and evaluation (M&E), as it establishes the underlying assumptions, goals, and pathways for an intervention based on its core values (Stein & Valters, 2012; King, 2021; Thornton, et al., 2017; Weiss, 2018). A Values Based Theory of Change (A VBToC) is an approach to creating a plan for change that is guided by a set of core values. It differs from a standard theory of change by making these values central to the entire process, ensuring that the "how" of change is rooted in the organization's principles and that the intended outcomes reflect these values (Stein & Valters, 2012; King, 2021; Thornton, et al., 2017; Weiss, 2018). This approach uses the theory of change framework (linking inputs, activities, outputs, and outcomes to impacts) to illustrate how the organization's core values drive the strategy and lead to desired changes (Stein & Valters, 2012; King, 2021; Thornton, et al., 2017; Weiss, 2018).

This approach helps to ensure that monitoring and evaluation efforts are aligned with the program's values and intended impact from the outset (Stein & Valters, 2012; King, 2021; Thornton, et al., 2017; Weiss, 2018). A VBToC provides a roadmap that outlines how a program, guided by its values, intends to achieve its goals. It makes the "how" explicit, detailing the activities, outcomes, and impact expected over time.

***Formulating Values Based M&E Questions:*** Formulating Values Based M&E Questions is a crucial practice of values based monitoring and evaluation (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000). Formulating values-based Monitoring and Evaluation (M&E) questions is essential for ensuring that a program's outcomes are not only effective but also aligned with its core principles and ethical considerations, such as equity, integrity, and social justice. These questions move beyond simple metrics to explore the quality and impact of the work on people and communities (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000).

Values-based Monitoring and Evaluation (M&E) questions are designed to assess if a program's implementation and outcomes align with an organization's core principles (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000) (e.g., integrity, compassion, equity, sustainability, collaboration). These questions go beyond standard performance metrics to evaluate the ethical and cultural impact of the work (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000). Values-based Monitoring and Evaluation (M&E) questions are critical

because they ensure the evaluation goes beyond mere metrics to assess relevance, ethical considerations, social impact, and sustainability, aligning the project with the true needs and aspirations of stakeholders.

Values-based questions help determine if a program's objectives and implementation strategies align with the core human, community, and organizational values and ethical standards, such as equity, transparency, and social justice (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000). This prevents the project from becoming irrelevant or even harmful to the communities it serves. Traditional M&E often focuses on easily quantifiable indicators. Values-based questions, often qualitative in nature, help capture "soft" or intangible values like cultural heritage, community cohesion, or stakeholder experiences, which are crucial for understanding the full picture of an intervention's impact (Chazdon & Paine, 2014; Myrick, 2013; Spaulding, 2013; Stufflebeam, 2000). By incorporating the values and perspectives of all stakeholders, especially marginalized communities, the M&E process becomes more inclusive and participatory. This fosters a sense of ownership, increasing their commitment to the project's success and ensuring findings are relevant and actionable.

When M&E questions are value-driven, they provide richer, context-specific insights into why a program succeeded or failed, not just what happened (Mark, 2003; Mark & Shotland, 1985; Taylor-Powell, Steele & Douglass, 1996; Kiely, 2009). This evidence-based understanding enables managers and policymakers to make more informed and strategic decisions that are grounded in the real-world context, rather than just relying on surface-level data or intuition. Values-based questions facilitate organizational learning by highlighting not just best practices, but also what didn't work and why (Taylor-Powell, Steele & Douglass, 1996; Kiely, 2009). This continuous feedback loop supports adaptive management, allowing for timely adjustments to strategies and ensuring the project remains responsive to evolving needs and challenges. By explicitly defining and evaluating against shared values, organizations enhance accountability to funders, partners, and the public. Demonstrating that funds are used in alignment with agreed-upon ethical principles builds trust and credibility (Mark, 2003; Mark & Shotland, 1985; Taylor-Powell, Steele & Douglass, 1996).

***Creating Values Based M&E Indicators:*** Creating values-based Monitoring and Evaluation (M&E) indicators is a crucial practice within values-based monitoring and evaluation, a type of evaluation that prioritizes and explicitly incorporates the human, community, and organizational values relevant to the program or project being assessed (Dahl, 2013; Burford, et al., 2013; Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016). Values-based M&E indicators are performance measures that specifically track progress toward outcomes defined by the deeply rooted values and aspirations of stakeholders, especially marginalized communities and individuals (Dahl, 2013; Burford, et al., 2013; Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016). They go beyond traditional quantitative measures (e.g., number of people trained) to capture changes in "soft" or intangible values, such as self-esteem, social cohesion, empowerment, or quality of life, which are often difficult to quantify but are fundamental to true transformational change.

Creating values-based M&E indicators is a crucial practice because it ensures that monitoring and evaluation systems measure what truly matters to stakeholders, particularly beneficiaries, rather than just what is easy to count (Dahl, 2013; Burford, et al., 2013; Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016). This approach leads to more holistic, relevant, and impactful project management and evaluation. Values-based indicators capture the depth and quality of change, not just the scale. While traditional indicators might count the "number of people trained," a values-based approach also seeks qualitative data on how the training improved participants' "dignity, voice, and daily ease of living," providing a richer picture of success. By developing indicators that reflect the values and priorities of the people and communities being served, the M&E process becomes more relevant and meaningful to them. This fosters greater ownership and participation in the project and its evaluation. (Dahl, 2013; Burford, et al., 2013; Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016).

Decisions informed by values-based indicators are more likely to address the actual needs and well-being of the target population (Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016). This evidence-based approach helps managers and policymakers choose interventions that provide genuine value and align with ethical principles, rather than just meeting numerical targets. Measuring progress against shared values and qualitative outcomes ensures accountability not just for the efficient use of funds, but for achieving the intended positive impact on people's lives. This builds trust with beneficiaries, donors, and partners. By providing a detailed understanding of both successes and failures, values-based indicators help organizations learn more effectively from their experiences (Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016).. This learning can be applied to improve current and future interventions, making them more effective in achieving desired, long-term outcomes.

Traditional quantitative indicators often struggle to capture complex social or environmental changes (Dahl, 2013; Burford, et al., 2013; Burford, Tamás & Harder, 2016; Gregory, Easterling, Kaechele & Trousdale, 2016). Values-based M&E embraces a mix of quantitative and qualitative methods (e.g., case studies, storytelling, and focus groups), allowing for a more nuanced and comprehensive assessment of complex projects. Values-based indicators prevent the distortion of project goals by ensuring that the M&E system is a tool for achieving a genuine positive difference, and not merely a compliance exercise focused on easily quantifiable metrics.

***Values Based Data Collection:*** Values Based Data Collection is a core practice of Values Based Monitoring and Evaluation (VBME) (Even & Shankaranarayanan, 2005, Brighouse, Ladd, Loeb & Swift, 2018; Zahle, 2018). Values-based data collection is the process of collecting data while considering ethical and practical values, such as autonomy, justice, and beneficence, to ensure a project is both methodologically sound and responsible (Even & Shankaranarayanan, 2005, Brighouse, Ladd, Loeb & Swift, 2018; Zahle, 2018). It involves designing data collection with a clear purpose, anticipating the value of the data to stakeholders, and using methods that are fair and ethical, particularly when dealing with sensitive information or making important decisions. This approach also acknowledges that certain values, like those related to social responsibility, can and should influence how data is collected, interpreted, and used. (Even & Shankaranarayanan, 2005, Brighouse, Ladd, Loeb & Swift, 2018; Zahle, 2018).

This practice emphasizes that the decisions made based on M&E findings are not purely objective or data-driven but are rather value-laden, considering ethical implications, stakeholder well-being, and alignment with the organization's mission (Collier, 2012; Stasko, 2014; Hwang, Nam & Ha, 2021; Hwang, Nam & Ha, 2021; Collier, 2012). For example, evidence of a highly effective but potentially ethically problematic program would be scrutinized through the lens of organizational values before being implemented or scaled up. This ensures that the organization maintains its integrity and accountability, balancing effectiveness with ethical responsibility.

Traditional M&E often focuses heavily on quantitative data and predefined indicators. Values-based collection, in contrast, actively seeks qualitative and personal evidence (needs, hopes, expectations, lived experiences, cultural contexts) that reveals the diverse and sometimes conflicting values at play (Collier, 2012; Stasko, 2014; Hwang, Nam & Ha, 2021; Hwang, Nam & Ha, 2021; Collier, 2012). This provides a deeper, more nuanced understanding of how an intervention is truly affecting people's lives and why changes are occurring. By involving beneficiaries and local communities in defining what success looks like and how to measure it, the data collection process becomes more relevant and culturally appropriate. This participatory approach fosters a sense of ownership, ensures the data collected is meaningful to those it impacts, and incorporates diverse perspectives (Collier, 2012; Stasko, 2014; Hwang, Nam & Ha, 2021; Hwang, Nam & Ha, 2021; Collier, 2012).

When data reflects the values of all stakeholders, it provides a foundation for shared decision-making (Even & Shankaranarayanan, 2005, Brighthouse, Ladd, Loeb & Swift, 2018; Zahle, 2018). This means that program adjustments and future strategies are informed not just by "what works" from a technical standpoint, but also "what matters" to the people involved, leading to more balanced and relevant outcomes. The process of deliberately exploring values helps to make implicit assumptions explicit. It reveals situations where values may conflict (e.g., efficiency vs. quality of life), allowing for open discussion and negotiation to reach a considered decision, rather than assuming a single "right" answer (Even & Shankaranarayanan, 2005, Brighthouse, Ladd, Loeb & Swift, 2018; Zahle, 2018). Transparent, values-based data collection demonstrates a commitment to integrity and the responsible use of resources to all stakeholders, including donors and the wider public. This bolsters trust and legitimacy for the organization's initiatives.

**Values Based Data Analysis:** Values Based Data Analysis is an inherent and core practice of any robust monitoring and evaluation (M&E) framework, which must align data and analysis with the projects or organization's core values and ethical objectives (Collier, 2012; Stasko, 2014; Hwang, Nam & Ha, 2021; Hwang, Nam & Ha, 2021; Collier, 2012). Values-based Monitoring and Evaluation (M&E) data analysis is an approach that explicitly incorporates the core principles, ethical standards, and desired impact of a program or organization into the entire data analysis and interpretation process. It goes beyond just measuring numerical targets to assess how well an intervention aligns with and delivers on its fundamental values and principles, such as equity, transparency, accountability, and inclusivity (Even & Shankaranarayanan, 2005, Brighthouse, Ladd, Loeb & Swift, 2018; Zahle, 2018). Instead of success being solely defined by quantitative indicators, it is also judged by how well the project upholds its core values. Values help determine

the criteria (performance domains), standards (performance levels), and weighting (prioritization) of what constitutes a successful outcome.

A values-based approach often includes an "equity lens" in data analysis, which involves disaggregating data by factors like socio-economic status, gender, age, and ethnicity to understand if the program is benefiting all target groups equitably, with particular interest in marginalized populations (Brighouse, Ladd, Loeb & Swift, 2018; Stasko, 2014; Hwang, Nam & Ha 2021). It emphasizes the importance of qualitative data (from interviews, focus groups, case studies, etc.) to capture the rich, contextual narrative and human experiences behind the numbers. This helps explain why something is happening and whether the intervention is compatible with local norms and practices, which purely quantitative data might miss.

Values-based M&E data analysis ensures that M&E serves as a tool for driving principled and impactful change, rather than just a mechanism for results-based reporting (Brighouse, Ladd, Loeb & Swift, 2018; Stasko, 2014; Hwang, Nam & Ha 2021). The primary purpose of the analysis is not just accountability to donors, but also to facilitate learning and adaptive management. The insights gained are used to make real-time adjustments and improve future program design and implementation based on evidence and shared values.

***Values Based Utilization of M&E Findings:*** Values Based Utilization of M&E Findings is a core practice and a critical component of effective Values Based Monitoring and Evaluation (Lim, Kim, Kim, Heo, Kim & Maglio, 2018; Yamaguchi, Oshima, Saso & Aoki, 2020). Values-based utilization of monitoring and evaluation (M&E) data ensures that while M&E provides the "facts" (evidence), the organization's values provide the "moral compass" for how those facts are acted upon. This framework suggests that evidence alone is insufficient to determine a course of action; it must be interpreted and applied within an ethical context guided by the organization's core principles (Lim, Kim, Kim, Heo, Kim & Maglio, 2018; Yamaguchi, Oshima, Saso & Aoki, 2020).

Values-based utilization of Monitoring and Evaluation (M&E) findings is an approach where an organization's core values, principles, and ethical standards directly guide how M&E data is interpreted, shared, and ultimately used for decision-making and learning. (Hwang, Nam & Ha, 2021; Brunner, Fitch, Grassia, Kathlene, & Hammond, 1987; Kothari & Lackner, 2006). This approach goes beyond simply using evidence for rational decision-making; it ensures that the actions taken as a result of M&E findings align with the organization's fundamental mission and values, such as transparency, accountability, equity, or community empowerment. A values-based approach promotes a culture of continuous learning and adaptation, where findings, both positive and negative, are used as opportunities for improvement rather than just for judgment. (Hwang, Nam & Ha, 2021; Brunner, Fitch, Grassia, Kathlene, & Hammond, 1987; Kothari & Lackner, 2006).

Values-based utilization encourages a culture of critical reflection on why certain outcomes occurred and how they align with core principles (Lim, Kim, Kim, Heo, Kim & Maglio, 2018; Yamaguchi, Oshima, Saso & Aoki, 2020). This deep learning process allows organizations to learn from both successes and failures, adapt strategies in response to emerging issues, and improve future program design in a manner consistent with their identity and mission.



## Values Based Monitoring and Evaluation Process

The monitoring and evaluation (M&E) process involves a continuous cycle of monitoring (tracking progress and performance) and periodic evaluation (systematic assessment of effectiveness, relevance, and impact) to improve projects and programs. Key steps include designing the M&E framework with clear goals and indicators, collecting and analyzing data, and using the findings to make adjustments and inform future decisions.

The Values-Based Monitoring and Evaluation Process is a systematic approach to tracking progress and assessing the success of a project based on its intended values and objectives. It involves defining clear objectives and indicators, collecting baseline data, and regularly monitoring results to track progress. The process includes periodic evaluations to assess effectiveness, efficiency, and impact, with a final step of reporting and using the findings to inform decision-making, improve performance, and demonstrate accountability.

***Undertake Values Based M&E Stakeholder Analysis:*** Stakeholder Analysis is a crucial process in values-based monitoring and evaluation (VBME), serving as the foundational step for effective engagement, decision-making, and project success (Breuer & Lüdeke-Freund, 2019; Van Marrewijk, 2004; Babar, Ghazali, Jawawi & Zaheer, 2015; Talley, 2001). It helps to ensure that all individuals and groups affected by, or who can influence, a project are identified, understood, and appropriately involved throughout the project lifecycle.

A Values Based M&E Stakeholder Analysis is an approach that explicitly incorporates stakeholders' core values, priorities, and ethical considerations into the monitoring and evaluation (M&E) process (Breuer & Lüdeke-Freund, 2019; Van Marrewijk, 2004; Babar, Ghazali, Jawawi & Zaheer, 2015; Talley, 2001). This goes beyond traditional analysis (which often focuses solely on power and interest) to ensure M&E is relevant, equitable, and sensitive to the diverse perspectives and potential impacts on all involved parties, particularly project beneficiaries. Projects and programs that effectively incorporate stakeholder values are more likely to meet their objectives, stay within budget, and achieve sustainable, long-term positive social or environmental impact because they are better aligned with the local context and beneficiaries' actual needs (Babar, Ghazali, Jawawi & Zaheer, 2015; Zhang & El-Gohary, 2016; Castelnovo, 2013).

Values-based M&E stakeholder analysis is a crucial process that moves beyond mere project management to ensure ethical practice, shared ownership, better decision-making, and sustainable outcomes by integrating the diverse values, interests, and expectations of all affected parties into the monitoring and evaluation (M&E) framework (Babar, Ghazali, Jawawi & Zaheer, 2015; Zhang & El-Gohary, 2016; Castelnovo, 2013). It ensures that decisions and evaluations consider the interests and impacts on all stakeholders, especially potentially disadvantaged or marginalized groups, which is a moral and ethical responsibility. Involving stakeholders in framing key evaluation questions, collecting and interpreting data, and discussing findings provides diverse perspectives that ensure the evaluation is relevant, credible, high-quality, and its findings are actually used for improvement (Breuer & Lüdeke-Freund, 2019; Van Marrewijk, 2004; Babar, Ghazali, Jawawi & Zaheer, 2015; Talley, 2001).

By systematically identifying stakeholders' motivations, values, influence, and potential for support or opposition, managers can make more informed, holistic, and strategic decisions that align project goals with stakeholder needs and expectations (Babar, Ghazali, Jawawi & Zaheer, 2015; Zhang & El-Gohary, 2016; Castelnovo, 2013). The analysis serves as an early warning system. By anticipating potential resistance, conflicts, or misunderstandings related to differing values and interests, project teams can develop strategies to address concerns early on, minimizing disruptions, legal challenges, and delays. Transparent and regular engagement that values stakeholder input helps build trust and stronger relationships among all parties. This fosters a sense of ownership and commitment, which is crucial for gaining widespread support and turning potential opponents into project advocates (Van Marrewijk, 2004; Babar, Ghazali, Jawawi & Zaheer, 2015; Talley, 2001). The feedback mechanisms inherent in the process allow organizations to continuously learn from stakeholder input, adapt strategies as contexts and opinions change, and improve future project design and execution.

***Establish Values Based Baselines:*** Establishing values-based baselines is a key process in Values-Based Monitoring and Evaluation (VBME). A baseline represents the starting point or initial condition before an intervention begins and serves as the reference against which all progress and eventual impact are measured (Kelly & Reid, 2021; Kyriakides, 2002; Ssekamatte & Okello, 2016; Ashton, Gowland-Pryde, Roth & Sturt, 2024). In Monitoring and Evaluation (M&E), "values based baselines" are initial reference points (data or conditions) that are explicitly defined and measured based on the core values, principles, and perspectives of the project's stakeholders, including the community, rather than purely objective, top-down metrics.

This process emphasizes the ethical implications of M&E, ensuring that the process does not impose external values or create unrealistic expectations. It focuses on equity and the legitimacy of the monitoring efforts by incorporating local knowledge (Kelly & Reid, 2021; Kyriakides, 2002; Ssekamatte & Okello, 2016; Ashton, Gowland-Pryde, Roth & Sturt, 2024). This contrasts with rigid, fixed baselines that can become quickly outdated or irrelevant in a changing environment, potentially leading to a failure to achieve long-term goals. The values-based approach aligns closely with principles of adaptive management, a strategy for operating in the face of uncertainty by learning from the effects of management practices.

Unlike a traditional fixed baseline (a one-time measurement), a values-based baseline acknowledges that social, environmental, and stakeholder values, as well as the conditions themselves, can change over time. The process actively engages local communities and other stakeholders in defining what constitutes a "positive" or "desired" change (Kelly & Reid, 2021; Kyriakides, 2002; Ssekamatte & Okello, 2016; Ashton, Gowland-Pryde, Roth & Sturt, 2024). This ensures that the M&E system measures what is relevant and valuable to the people affected by the intervention. The baselines are tailored to the specific social, cultural, and environmental context of the project, acknowledging that "progress" can be defined differently across various communities and situations.

***Develop Values Based M&E Framework:*** Developing a Values-Based Monitoring and Evaluation (M&E) Framework is a key and essential process within the broader approach of values-based monitoring and evaluation (Sisimayi, Ngwenya & Mabwe, 2024; Kuchenmüller,

Chapman, Takahashi, Lester, Reinap, Ellen & Haby, 2022). A VBME Framework is a monitoring and evaluation approach that explicitly incorporates and "values the values" (human, community, and/or organizational) of all stakeholders involved in a program or project. This goes beyond traditional M&E, which often focuses solely on objective, measurable results (outputs, outcomes, impacts), to consider the deeply rooted values, beliefs, and aspirations that influence human behavior and decision-making, especially in complex social contexts (Sisimayi, Ngwenya & Mabwe, 2024; Kuchenmüller, Chapman, Takahashi, Lester, Reinap, Ellen & Haby, 2022).

A VBME Framework ensures that the monitoring and evaluation process itself is guided by the core values of the initiative, making it more holistic and better equipped to capture the full picture of impact and the underlying reasons for success or failure (Sisimayi, Ngwenya & Mabwe, 2024; Kuchenmüller, Chapman, Takahashi, Lester, Reinap, Ellen & Haby, 2022). This framework serves as a roadmap that ensures the entire M&E system is aligned with an organization's and community's core values, ethics, and desired principles for social change. VBME framework integrates subjective "soft" values into the evaluation criteria and questions, which might not be easily quantifiable but are crucial for a complete understanding of change.

VBME framework emphasizes engaging a diverse range of stakeholders, including marginalized voices, in discussions about the program's progress and the implications of the findings. This promotes a more democratic and inclusive evaluation practice (Wall, Agnihotri, Matzen, Divis, Haass, Endert & Stasko, 2018; Cockton, 2005; Stasko, 2014). VBME framework requires a nuanced understanding of the interplay between individual, local community, and organizational values within a specific context, recognizing that a "one-size-fits-all" approach to evaluation is insufficient. By considering values, the evaluation process aims to remain relevant, useful, and comprehensible to the people and institutions involved, thus fostering ownership and the use of findings for decision-making and continuous improvement (Wall, Agnihotri, Matzen, Divis, Haass, Endert & Stasko, 2018; Cockton, 2005; Stasko, 2014).

**Develop Values Based Monitoring and Evaluation Criteria:** Developing Values Based Monitoring and Evaluation (VBME) Criteria is a critical process in values based monitoring and evaluation (Palfrey, Thomas & Phillips, 2012; Kusek & Rist, 2004; Ghorbani, Lu & Tavallae, 2009). VBME Criteria are the standards or benchmarks used to make judgments about the merit, worth, or significance of an intervention (program, policy, project) by explicitly incorporating the diverse values (beliefs about what is important or desirable) of all relevant stakeholders, including beneficiaries, communities, and organizations (Palfrey, Thomas & Phillips, 2012; Kusek & Rist, 2004; Ghorbani, Lu & Tavallae, 2009).

Values-based Monitoring and Evaluation (M&E) incorporates core principles and ethics into the assessment process to ensure a program or project is not only achieving its objectives but also adhering to key societal and organizational values. These values can be integrated into the standard evaluation criteria (relevance, coherence, effectiveness, efficiency, impact, and sustainability) (Palfrey, Thomas & Phillips, 2012; Kusek & Rist, 2004; Ghorbani, Lu & Tavallae, 2009).

Values-based monitoring and evaluation (M&E) criteria are crucial because they ensure that projects and programs are not only effective and efficient but also relevant, equitable, and aligned

with the deeply rooted human and community values they are intended to serve. (Ghorbani & Tavallae, 2009; Mark & Shotland, 1985; Dixon, Pickard & Robson, 2002; Palfrey, Thomas & Phillips, 2012). This approach prevents evaluations from becoming detached or irrelevant by integrating social and ethical dimensions into the assessment process. Evaluations that neglect to consider stakeholders' values risk becoming irrelevant and unused. Incorporating values helps determine if an intervention is doing the "right" thing in a specific cultural, social, and political context. Value-based M&E actively seeks to understand and incorporate the preferences and aspirations of all stakeholders, especially marginalized communities (Ghorbani & Tavallae, 2009; Mark & Shotland, 1985; Dixon, Pickard & Robson, 2002; Palfrey, Thomas & Phillips, 2012). This inclusive approach fosters a sense of ownership and is essential for achieving more equitable and durable transformational change and sustainable development outcomes. By making the underlying values explicit and transparently disclosing the criteria used for judgment, value-based M&E increases accountability to all stakeholders, including beneficiaries, funders, and the broader community. Traditional M&E often focuses on easily quantifiable metrics (e.g., cost, outputs) but may overlook "soft" or intangible values like cultural heritage, social cohesion, or community well-being. A value-based approach considers these less tangible but powerful factors, providing a more comprehensive understanding of the project's true impact (Ghorbani & Tavallae, 2009; Mark & Shotland, 1985; Dixon, Pickard & Robson, 2002; Palfrey, Thomas & Phillips, 2012).

***Undertake Regular Values Based Monitoring:*** Undertaking regular Values Based Monitoring (VBM) is a critical process within the broader framework of Values Based Monitoring and Evaluation (VBME). Regular Values Based Monitoring (VBM) is the systematic and continuous process of collecting and analyzing data to track the progress of a project or program against its established values and objectives (Stein, 2005; Malmi & Ikäheimo, 2003; Ameels, Bruggeman & Scheipers, 2002). This type of monitoring is a critical component of a broader Monitoring and Evaluation (M&E) framework, particularly within a results-based management (RBM) approach, as it ensures that ongoing activities remain aligned with the core principles and desired outcomes/impacts. The monitoring is explicitly linked to the program's defined core values and desired results, ensuring that the implementation process and outcomes are consistent with the intended mission and principles (Stein, 2005; Malmi & Ikäheimo, 2003; Ameels, Bruggeman & Scheipers, 2002).

This process emphasizes that ongoing, real-time monitoring of performance against core values and their associated drivers is essential for making informed, adaptive decisions that ensure long-term value creation and alignment with the organization's or projects ultimate goals. (Hunter, Fitzgerald & Barlow, 2014; Zebari, 2011; Shampine, 1993; Matsiliza, 2019; Valadez & Bamberger, 1994). Regular monitoring provides timely data and insights into whether activities and outputs are progressing as planned and remaining aligned with the desired values and outcomes. This allows managers to make prompt, evidence-based adjustments. Continuous monitoring allows for the early identification of potential problems, risks, or unintended consequences before they escalate, minimizing the risk of project failure or value destruction (Hunter, Fitzgerald & Barlow, 2014; Zebari, 2011; Shampine, 1993; Matsiliza, 2019; Valadez & Bamberger, 1994).

Regular reporting of VBM findings to stakeholders (including beneficiaries, funders, and staff) ensures transparency and accountability in how resources are used and what results are being achieved in relation to the defined values (Stein, 2005; Malmi & Ikäheimo, 2003; Ameels, Bruggeman & Scheipers, 2002). VBM facilitates a culture of ongoing reflection and learning. By regularly assessing performance and using feedback loops, organizations can refine their strategies and improve future performance and impact. VBM helps organizations avoid focusing solely on short-term financial gains (which might undermine core values or long-term sustainability) by tracking both financial and non-financial indicators tied to value drivers. (Stein, 2005; Malmi & Ikäheimo, 2003; Ameels, Bruggeman & Scheipers, 2002).

**Conduct Values Based Evaluations:** Values Based Evaluation (VBE) is a critical and fundamental process within a Values Based Monitoring and Evaluation (VBM&E) framework (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). Evaluations that do not consider the underlying human and organizational values are at risk of becoming irrelevant and unused. Values-Based Evaluation (VBE) is an approach to monitoring and evaluation (M&E) that places the deeply rooted human, community, and organizational values at the core of the assessment process. VBE is the mechanism within VBME that ensures the entire monitoring and evaluation process is grounded in human values, making interventions more ethical, effective, and truly impactful in the real world (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

VBE acknowledges that impact is not solely about measurable outputs (e.g., number of wells built) but also about "soft" or intangible values like cultural heritage, social cohesion, and dignity. It allows evaluators to understand the why and how well change occurred, not just what changed, which is essential for complex development contexts (Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012). By providing a nuanced understanding of the interplay between different values (individual, community, organizational, universal), VBE equips decision-makers with richer, evidence-based insights. This helps in adapting strategies to better align with the local context and avoid unintended negative consequences, such as community conflicts or project failure (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

Unlike traditional evaluations that often prioritize easily quantifiable metrics, VBE actively seeks to understand and incorporate the "soft," often intangible, values that influence human behavior, decision-making, and project outcomes, especially in complex or fragile contexts (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). The critical process of VBE involves actively identifying, assessing, and integrating diverse stakeholder values throughout the entire evaluation lifecycle (from planning to reporting and utilization), making the evaluation more democratic, inclusive, and capable of addressing complex, real-world issues.

Evaluations that neglect to consider stakeholders' values risk becoming irrelevant or unused, as they may overlook crucial factors that influence human behavior and decision-making. VBE helps ensure the evaluation is pertinent to the real-world experiences and aspirations of the people involved (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). VBE allows for a more complete understanding of change by exploring both tangible results and intangible outcomes (e.g., shifts in cultural practices, community empowerment, or social cohesion) that are often missed by conventional metrics alone. By bringing the values of marginalized communities and diverse

stakeholders to the surface, VBE enhances accountability and transparency. It makes people and communities active agents in the M&E process, ensuring their perspectives are considered in findings and recommendations (Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012).

VBE enhances accountability not just for financial expenditures, but for adhering to agreed-upon social and ethical principles (e.g., equity, participation, respect). By making the "valuing process" explicit, it promotes transparency in how decisions are made and ensures that organizations are answerable to the communities they serve (Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012). It actively seeks to surface and incorporate the voices and aspirations of marginalized communities and individuals who might be overlooked in traditional M&E approaches. This participatory methodology empowers stakeholders, promoting a more democratic evaluation process and building local ownership of the outcomes (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

By explicitly addressing and attempting to balance potentially competing individual, local, community, and universal values, VBE aims to foster more inclusive, equitable, and sustainable development outcomes and potentially trigger transformative learning and behavior changes (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). VBE balances traditional performance metrics with an assessment of the behaviors and underlying values that drive those metrics, leading to a more holistic picture of performance and impact. By placing values at the core of the analysis and learning process, VBE helps organizations learn from experience and adjust their approach to foster more equitable and sustainable outcomes. It moves the focus from short-term targets to long-term, systemic change (Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

***Undertake Values Based Reporting of M&E Findings:*** Values-based reporting of Monitoring and Evaluation (M&E) findings is a critical process within Values-Based M&E (Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). In the context of Values Based Monitoring and Evaluation (VBME), Values Based Reporting of M&E Findings is a critical process of transparently and effectively communicating the results, progress, challenges, and lessons learned of a project or program, with an explicit emphasis on how these findings relate to the core values and principles of the initiative and the stakeholders involved. Values Based Reporting moves beyond a purely results-based management (RBM) approach to ensure that how results are achieved, and whether they align with the organization's ethical commitments, are central to the reporting and learning process (Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

This process goes beyond simply presenting objective, data-driven results (e.g., number of beneficiaries reached) to include a qualitative assessment of whether the project is aligning with its intended ethical, social, or organizational value (Braun & Clarke, 2025; Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012; Piccirillo 2016; Kusek & Rist, 2004). It aims to answer not just "were the targets met?" but also "did the project deliver on its promises in a way that aligns with our shared values?" and "what was the actual value or impact generated?"

Values-based reports go beyond mere data presentation to include analysis of why something is or is not working (Larson-Hall & Plonsky, 2015; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008) (e.g., alignment with community values). This deeper understanding enables managers to make more informed, evidence-based decisions and adapt project strategies to changing circumstances, rather than relying solely on assumptions. Values-based reporting often incorporates qualitative data alongside quantitative metrics, providing a comprehensive narrative of the project's impact, including the human experience and complex social realities that statistics alone might miss (Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

Values Based Reporting ensures that M&E results are not just data points in a document, but a meaningful narrative that guides ethical decision-making and reinforces the core mission of the project or organization (Sisimayi, Ngwenya & Mabwe, 2024; Attard & Brennan, 2018; Van der Knaap, 1995; Jiang & Li, 2016; Chelimsy, 2012). M&E reports often present raw data and indicators. Values Based Reporting goes further by interpreting this data through the lens of the project's or organization's core values (e.g., fairness, integrity, accountability, sustainability). This creates a story that resonates with stakeholders and provides a comprehensive picture of impact beyond just meeting numerical targets. By explicitly linking results to an ethical framework, this approach helps project managers and leaders navigate complex dilemmas where different interests or values may conflict (Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). It encourages a focus on the broader societal context and the well-being of all affected individuals, not just short-term gains or numerical results.

Reporting on results in terms of core values ensures that actions remain aligned with the organization's fundamental beliefs and purpose. (Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). This consistency builds trust with stakeholders, including donors and beneficiaries, and strengthens the organization's reputation. Explicitly reporting on how values influenced decisions and outcomes fosters a culture of transparency and shared accountability. This process makes clear to all stakeholders the moral compass guiding the project's implementation and management.

***Promoting Values Based Utilization of M&E Results:*** Promoting the values-based utilization of M&E results is a crucial process in Values Based Monitoring and Evaluation (Patton, 2004; Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008). Values Based Utilization of M&E Results is a crucial process within Values Based Monitoring and Evaluation (VBME) where the insights, findings, and data gathered through M&E activities are applied to inform decision-making, guide future actions, and improve program strategies in a manner that is consistently aligned with the core values and ethical principles of the stakeholders and organization involved. A values-based approach ensures M&E is not merely a technical compliance exercise but a meaningful tool for guiding an organization towards achieving its intended, ethically sound, and sustainable impact (Patton, 2004; Aguinis, Werner, Lanza Abbott, Angert, Park & Kohlhausen, 2010; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008).

Values-based utilization of M&E results is crucial for ensuring that projects and programs are not only effective but also align with their core values and objectives (Lee, Kawamoto, Hess, Park, Young, Hunter & Pendleton, 2016; Larson-Hall & Plonsky, 2015; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008; Estabrooks, 1999). This process involves using M&E data to inform strategic decisions, promote accountability, foster organizational learning, and drive continuous improvement, all while staying true to the mission. The core importance lies in using the results not just to measure success but to ensure the success itself reflects the desired values, leading to more impactful and meaningful outcomes (Weiss, 2021; Aguinis, et al., 2010; Peterson, Rogers, Cunningham-Sabo & Davis, 2007; Sisimayi, Ngwenya & Mabwe, 2024). Values-based utilization ensures that the "what" and "how" of a project are in harmony. It means that not only are the intended outcomes being met, but the way they are being achieved also aligns with the organization's ethical principles and values (Lee, Kawamoto, Hess, Park, Young, Hunter & Pendleton, 2016; Larson-Hall & Plonsky, 2015; Bozeman & Sarewitz, 2011; Castelnovo & Simonetta, 2008; Estabrooks, 1999).

Values-based utilization of Monitoring and Evaluation (M&E) results matters because it ensures that data-driven decisions are aligned with an organization's core mission and ethical principles, thereby enhancing accountability, increasing effectiveness, and fostering trust with stakeholders (Weiss, 2021; Aguinis, et al., 2010; Peterson, Rogers, Cunningham-Sabo & Davis, 2007; Sisimayi, Ngwenya & Mabwe, 2024). Integrating core values, such as equity, transparency, and respect for all people, into the M&E process helps ensure data is collected, analyzed, and used ethically. This prevents the misuse of findings or the unintentional harm of beneficiaries, for example, by ensuring confidentiality and informed consent. When M&E results are used within a values-based framework, it promotes transparency in how decisions are made and how resources are used (Sisimayi, Ngwenya & Mabwe, 2024; Attard & Brennan, 2018; Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012). This provides stakeholders (including donors, beneficiaries, and the public) with confidence that the organization is operating responsibly and staying "above board".

Values help define what "success" looks like beyond mere numbers. A values-based approach ensures that the project remains relevant to the actual needs and cultural dynamics of the target community, not just the easily quantifiable metrics that might be favored by external parties (Sisimayi, Ngwenya & Mabwe, 2024; Attard & Brennan, 2018; Van der Knaap, 1995; Jiang & Li, 2016; Chelimsky, 2012). Actively involving stakeholders in the M&E process, in line with values like participation and inclusion, builds trust and a sense of ownership over the project's outcomes. This collaboration increases the likelihood that communities will adopt and sustain the project's benefits in the long term (Benneworth & Peñuela, 2014; Beyer & Trice, 1982; Lim, Kim, Kim, Heo, Kim & Maglio, 2018). Values-based utilization helps determine not just if a project is efficient, but if the investment aligns with the organization's ultimate mission (Weiss, 2021; Aguinis, et al., 2010; Peterson, Rogers, Cunningham-Sabo & Davis, 2007; Sisimayi, Ngwenya & Mabwe, 2024). It helps leadership decide where to invest more resources, replicate successful interventions, or discontinue those that do not align with the core values and objectives.



## **Conclusion and Recommendations**

The purpose of paper was to undertake a conceptual analysis of Values Based Monitoring and Evaluation (VBME) and to develop a clear, shared understanding of what constitutes this M&E approach and how it functions in practice. VBME moves beyond a conventional, compliance-focused M&E to one that is context-appropriate, culturally sensitive, and focused on identifying and enhancing the "deeply-held" priorities and intangible legacies of a program or community. VBME is crucial in the 21st century for ensuring policies, programs and projects align with ethical principles, promote transparency, and are accountable to all stakeholders, especially marginalized groups. It moves beyond simple tracking to assess the deeper impact of interventions, foster inclusive participation, and drive effective, evidence-based decision-making to navigate complex global challenges like persistent poverty and climate change.

There is a notable contextual gaps in values based monitoring and evaluation as existing research on values in monitoring and evaluation. Research and practice confirm the existence of significant contextual gaps in values-based monitoring and evaluation, particularly in the applicability of models from developed countries to developing nation contexts. Existing M&E frameworks, often driven by international donors and originating from Western experiences, may not adequately capture or value local contexts, priorities, and cultural norms.

Despite the recognized importance of values-based monitoring and evaluation (VBME), there is indeed limited theoretical elaboration and a lack of a robust, unified theoretical framework for the approach in academic literature. It is widely acknowledged in academic and professional literature that while values are central to the practice of evaluation, the specific approach of Values-Based Monitoring and Evaluation (VBME) has a limited or underdeveloped explicit theoretical foundation compared to other M&E frameworks.

VBME should be grounded in compelling and relevant theories to provide a structured, rigorous, and transparent framework for understanding and assessing complex intervention. Theory provides the essential roadmap and analytical lens for navigating the subjective and complex nature of values, ensuring that values-based M&E is not just a qualitative exercise but a rigorous and effective tool for achieving meaningful and sustainable change.

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