

Participatory Monitoring and Evaluation (PME): Principles, Practices and Process

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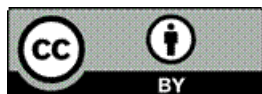
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Participatory Monitoring and Evaluation (PME): Principles, Practices and Process

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ABSTRACT

Participatory Monitoring and Evaluation (PM&E) is a crucial epistemology that is practiced in the democratic praxis of development and citizen governance. To establish a general framework on PM&E, this inquiry argues that the transformative nature of PM&E embroils the intentional redistribution of epistemic power like legitimate power to formulate problems, set standards of success and maintain knowledge. Its core principles, like empowerment, intersectional inclusiveness as well as downward accountability, are cross-examined in the analysis to see how they logically dismantle the top-down logic of conventional evaluation. These principles are motivated by practices such as participatory mapping, collaborative data analysis, and negotiated action-planning which together reposition stakeholders as the key providers of data. The paper also describes the iterative process of organizing this engagement that is characterized as a conduit of institutionalizing current social learning and adapting management as opposed to compliance auditing. The unresolved paradox between the deep and contextual rigor of authentic engagement, and external requirements of simplified and standardized accountability measures is the essential gap that ought to be explored. In the face of such conflict, the analysis concludes that the prospective effectiveness of PM&E depends upon its strategic institutionalization. This implies simple reorganizing the donor reporting systems, professionalizing of facilitator as power and process brokers, and institutionalizing the evidence produced at the community level into the planning and budgeting processes of the social sectors. Eventually, PM&E emerges as the inseparable science that transform commitments and normative implications of equity and self-determination into the key drivers of social change. Thus, PM&E takes the stance of the basis of equitable and sustainable development.

Keywords: Political epistemology Co-production of knowledge, deliberative governance, participatory inquiry, social learning.

INTRODUCTION

The traditional discipline of monitoring and evaluation (M&E) is undergoing an in-depth and necessary transformation that challenges the very ownership of knowledge and position of power in the process of defining the success in development (Patton, 2023; Ramírez et al., 2017; Peterson & Skolits, 2020; Payne, 2017; Bonu, 2022; Budig et al., 2018). This reckoning has led to the creation of PM&E as a paradigm which transcends the modernization of its methodologies to a fundamental philosophical and ethical engagement in democratic practice (Ishom et al., 2021;

Djabbar, 2021; Weiss et al., 2016; Tallman, 2017). Moving beyond the simple enrolment of community members as data sources, PM&E re-conceptualizes stakeholders, particularly marginalized rights-holders as integral co-analysts, co-evaluators and ultimate arbiters of the transformations affecting their lives. (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018) This way of thinking emerges from a long-term process of critical reflection into the shortcomings of existing evaluation models that were based on technological modalities and not centered on the host communities or stakeholders (Agbenyo et al., 2021; Chevalier, 2019; Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). This approach is the fruit of decades of reflecting on the limitations of extractive, expert-driven evaluation models, which often produced technically robust but socially inert data, thus failing to capture the complex realities, the unintended consequences and local definition of progress (OECD, 2016; Luijckx & Benn, 2017; Pais et al., 2019). It is through PM&E that the sustainability and legitimacy of any intervention get inextricably integrated to the heart of agency of the stakeholder throughout the assessment cycle. This is not an imaginary undertaking but rather a rigorously and contextually-grounded discovery and appreciation of the complexity of social change (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). It fills a critical gap in traditional void between externally validated processes and contextual realities and impact (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021)

The operationalization of PM&E is based on a coherent but challenging set of principles that actively reorganizes power relationships and realities (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). Foundational empowerment goes beyond rhetorical display to entail the deliberate transfer of control on important M&E functions, such as defining indicators, monitoring information and authoring findings, to local actors (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). This is inherently underpinned by the principle of inclusivity which requires proactive, ongoing engagement with the full spectrum of community voices, especially those who are systematically silenced by factors such as age, gender, disability, ethnicity or class. These dynamics require the facilitators of the PM&E to navigate and overcome the complex web of power dynamics and privilege within communities themselves (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018). Transparency and accountability are also reoriented from an upward donor focus to a multidirectional principle where processes, data and decisions are accessible, while M&E officials and implementers are principally answerable to the community (Costa & Andreaus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). These principles

are made operational through dialogical practices such as participatory mapping, spatialising of local knowledge, community-led storytelling and focus groups discussions to capture qualitative nuance, in addition to joint score-carding that looks to quantify collective perception (Vieira et al., 2019; Koc et al., 2020). The whole endeavor is designed as an iterative and circular process starting from the participatory negotiation of purpose and framework of evaluation, followed by co-collection, then collective interpretation of data and consequent joint decision-making and action taking on the basis of findings. This model helps in transforming M&E from a linear and extractive event to a circular and embedded system, which is vital for social learning and adaptive management (Agbenyo et al., 2021; Chevalier, 2019).

Nevertheless, the embodiment of such an ideal structure is full of contentious tensions, and pragmatic complexities typical in this domain. Among the key issues is a clash between the complexity and time-intensive nature of actual engagement in addition to agencies or donor requirements of standardized and time-constrained deliverables (Hall, 2021; Sabatini et al., 2020). This tends to relegate practical considerations to the background thus undermining the participatory orientation of PM&E. Moreover, the role of the facilitator is a fundamentally complex task to undertake in the balances between facilitating a methodologically rigorous process without imposing external agendas and preconditioning inclusive dialogue while managing ambiguities as well as avoiding the hijacking of the process by the local elites (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). There is also the presence of ethical dilemma, particularly regarding the preservation of sensitive information shared in group sessions, and the possibility of creating expectations that the evaluation process would be unable to fulfill for the community (Kelly & Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022). The obstacles are not a sign of failure but native attributes of authentic work with communities in which PM&E practitioners must work with reflexivity, political savvy and adaptive creativity (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). In this study, thus, we will attempt to provide a critical and comprehensive exploration of PM&E, shifting from the prescriptive approach to an inclusive tool within the contentious and dynamic field of practice (Kelly & Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022; Okafor, 2021). The discussion shall be decidedly analytic concerning the relationship between various principles at the core of PM&E, pragmatisms behind its methods, and emotional and material dimensions of its process. The paper argues that implied questioning of power relationships by PM&E is its most valuable and strong advantage in the development not only of

more effective and sustainable interventions, but also of a model of an equitable and liberating type of social transformation (Fischer, 2019; Nyathi, 2021; Kissi et al., 2019; Okafor, 2021).

Principles of Participatory Monitoring & Evaluation

The PM&E principles do not qualify as a frivolous code of ethics. It is a radical model of democratizing the production of knowledge through the lens of development and social policy (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). All of these principles both criticize and dismantle some specified detail to traditional expert-dominated approach to evaluation, and demand not only its inclusion, but a fundamental redistribution of epistemological authority (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). This redistribution of power does not constitute their single definition, but rather their interdependence which is complex and the major underlying problem as necessitated by imperfect and power-based realities in the implementation space (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018; Mavrot & Pattyn, 2022). Therefore, to know these principles is to work with the practical philosophy of participatory action in which each commits to a specific form of justice in the process of evaluation itself.

Transparency works at the non-negotiable substrate for all other principles, creating a situation of deep-seated openness, aimed at demystifying technical and political layers of evaluation (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). Its mandate goes beyond the simple sharing of final reports, to include continuous disclosure of process; the criteria for facilitator selection; the full budget for the PM&E exercise; complete raw and aggregated data, minutes of meetings of the analysis; and the annotated drafts of conclusions (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). This challenges the traditional model where methodological choices as well as preliminary analyses are seen as the proprietary domain of outsider experts (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). In reality, active transparency requires the conversion of technical information into accessible methods including visual maps, community theatre, radio discussions in local language which must have a potential to be understood by people of all literacy and education levels (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). The principle engages a fundamental tension between the right to openly publish information and the professional or ethical imperative for the confidentiality of vulnerable people from whom data is obtained. Navigating this involves negotiated and granular agreements with stakeholders as to what can and cannot be made public, thereby making transparency a participatory resolution (Kelly

& Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022).

Inclusivity is the intentional and strategic approach to addressing and diminishing hyper-embedded social hierarchies that ensure that evaluation is not dictated by local elites or dominant groups. It is a construct of proactive equity, requiring facilitators to perform power analysis at the beginning of the process so that they are aware of groups who are marginalized based on gender, age, disability, ethnicity, religion, or economic status (UN Women, 2022). Its implementation involves the design of different, culturally appropriate points of entrance for each group. This may involve separate, women-only discussions, with female moderators, or the use of participatory tools that can be adapted for the participation of children or persons with disabilities. Inclusivity defies the convenient narrative of a single 'community voice' and insists to capture the myriad of often dissonant voices (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018). The operational cost is high and needs more time, resources and facilitator skill to manage multiple streams of engagement and then synthesize divergent findings. The biggest challenge lies in the analysis phase, where facilitators will have to open safe space for conflicting interpretations of the social situation by different social factions without pushing a false consensus that silences marginalized and vulnerable groups (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021)

Responsiveness is the principle to consecrate the whole PM&E cycle as a meaningful participation principle and to connect the act of evaluation to directly instigate changes in authority (Göttgens & Oertelt-Prigione, 2021; Boy, 2017; Cooley, 2000). Extensive participatory proceedings form the most crucial connection in avoiding having participation becoming a performative or extractive ritual. This principle ensures a formal commitment on the part of implementing organizations and power-holders to not only listen to findings that is generated collaboratively, but to show, through revised plans and budgets, how they will act on them (Patton, 2023; Ramírez et al., 2017; Peterson & Skolits, 2020). Mechanisms include joint action-planning workshops where community analysts and project managers communally develop and plan a revised work schedule or public forums where officials publicly agree to address prioritized community concerns. Responsiveness legitimizes local knowledge as an authentic type of managerial intelligence, which turns the evaluation not into a backwards-looking form of evaluation but into a forward-looking steering mechanism (Hall, 2021; Sabatini et al., 2020). The great tension it reveals lies between priorities

identified by the community and the artificial, pre-approved logical frameworks and budgets of donor-funded projects (Agbenyo et al., 2021; Chevalier, 2019). When the results of evaluation require a basic strategic shift, responsiveness serves to test the real dedication of organizations to adaptive management and invites unpleasant contributions where input from stakeholders would previously be systematically disregarded after being proactively solicited.

Accountability, in the context of PM&E, embodies a radical shift from an upward path (to donors) to a main downward path (to rights-holders) (Costa & Andreaus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). It adds operational transparency and responsiveness into a structure of answerability. This principle engineers channels to facilitate communities and stakeholders to interrogate issues relating to power, such as power to explain failure and redress deficiency. Concrete manifestations are institutionalized forms of social audits, in which members of the community cross-check expenditures of a project against concrete deliverables, or citizens report cards in which citizens publicly rate service performance (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). This helps in transforming PM&E from an apolitical technical exercise to a mechanism of social accountability and governance (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). The inherent conflict is in finding a balance between this downward force and the irreducible demands of the upward accountability to funders (OECD, 2016; Luijckx & Benn, 2017; Pais et al., 2019). Most refined PM&E systems negotiates this by making sure that the data and priorities developed with communities becomes the main substance of reports to donors, thereby mainstreaming external accountability as much as internal legitimacy. This principle is an explicit recognition of the fact that evaluation is an exercise of power, and attempts to turn the traditional direction of evaluation on its head (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019).

Empowerment is the transformative link and final goal of the whole framework and it separates PM&E from being just about consulting systems (Gruba, 2024; Lebow, 1993; Tsai et al., 2023). It is a conscious process of capacity building and critical consciousness (conscientization) aimed at empowering stakeholders to take the means of assessment of their own reality into their hands. Empowerment is implemented through the deliberate transfer of skill, survey design, facilitating focus groups, spatial mapping, data interpretation, that persist as long-term community assets (Kelly & Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022). More radically, it calls for the real devolution of decision-making power that is giving up control over the choice of indicators

ownership of data, framing of analytics and formation of recommendations (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). The role of the facilitator changes from being an expert to a coach who tolerates some inefficiency and disorderly methods as the cost of genuine local ownership. The central paradox of empowerment is that it must be freely claimed by participants, because it cannot be "given" in a paternalistic fashion. The challenge for the facilitator is to set the conditions for self-empowerment while resisting the urge to lead or correct. It is a process demanding a high degree of humility on the part of the professional, a tolerance for ambiguity and a divergence of results (Botes & Van Rensburg 2021).

Intersectionality is the necessary analytical framework that lends depth and rigor to the concepts of inclusivity and empowerment, and avoids perpetuating data aggregation that decontextualizes compounded disadvantage (Botes & Van Rensburg 2021; Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). This principle rejects the analysis of social categories in isolation (e.g. "women" or "the poor" as uniform groups) and considers instead the ways in which intersecting identities (e.g. ethnicity, gender, disability, age) produce unique experiences of privilege and oppression in the lives of people. An intersectional PM&E process makes a concerted effort to find these nuances and hidden realities. Methodologically, this entails going beyond the use of standardized surveys and instead exploring layered, qualitative approaches through deep narrative interviews, peer-led research contained within specific subsets (or groups) or power-mapping exercises that identify unequal access to project benefits (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). It makes the evaluation question not only 'is the project working?' but 'for whom is it working, and for whom is it failing or even harming?' This makes the analysis and reporting difficult, inasmuch as it resists being fed simple, aggregate success stories. It reflects the ethical commitment that no project can be considered successful when it achieves the overall targets by making environments better for the moderately disadvantaged, while making it even more inconsequential for the most vulnerable. Intersectionality is thus the principle which ensures that PM&E serves social justice, and not just the cause of statistical efficiency (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019).

Collectively, these principles are not a categorization of steps but interdependent elements of a dynamic system. Transparency allows for relevant accountability; true inclusivism is informed by intersectional analysis; responsiveness validates and completes the empowerment process (Nyathi,

2021; Kissi et al., 2019; Okafor, 2021). The joint implementation of this framework represent the feedback to evaluation as form of democratic practice, whereby the process of assessing change represent process designed to serve as a catalyst for equitable and sustainable change. The friction between these ideals and constraints of the available resources, timelines and types of power structures is, not a failure in the framework, but the very arena in which there is room for skilled, reflexive PM&E practice (Hall, 2021; Sabatini et al., 2020).

Participatory Monitoring and Evaluation Practices

The practices of PM&E are the consistent set of practical tools from which its principles are given visibility and effectiveness. These are by no means neutral techniques, but are politically and epistemologically-charged interventions, each of which is designed to reconfigure the relationships of power, knowledge, and decision-making in a systematic way (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). Understanding these practices entails working with practical expertise of supporting democratic inquiry, where the choice of method or design of a workshop, are based on the numerous interventions of the facilitator and how they influence legitimacy and outcomes (Owen, 2020; Mertens et Aal., 2025; Smith & Larimer, 2018). This discussion explains these core practices, their methodological content, conflict inherent between these practices and how they fit into the greater cycle of PM&E.

Stakeholder Engagement and Analysis extends past the conventional approach of consultation to transform into a strategic, ongoing process of relationship-building and power mapping to assist the entire PM&E process (Payne, 2017; Bonu, 2022; Budig et al., 2018). Its initial step is a critical evaluation of the stakeholders that shifts the sheer identification of actors to categorize them in terms of their level of influence, interest and marginalization. This may frequently be achieved using instruments like power-interest grids (Patton 2023). This diagnostic has become so crucial to the design of differentiated plans to involve all stakeholders. To illustrate, facilitators might need to hold separate and confidential meetings with women or indigenous elders as part of the preparations before holding a larger mixed group (UN Women, 2022). This practice demands some degree of facilitation skills to be able to address the conflict situations that are present in communities and hierarchical systems of power without worsening them (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). It involves the active use of local intermediaries, adherence to culturally relevant structures of engaging with dialogue and developing safe

environments in which dissent could be made without fear. The relentless pressure of this practice is to prevent the common problem of elite capture, where the process becomes dominated by the leaders of the community. Similarly, it entails admitting and fighting the participatory burnout by making sure that the provided process is not reduced to a mere box-checking (Hall, 2021; Sabatini et al., 2020). The continuity, participation and diversity of stakeholders during the cycle and not just an initial meeting is what determines its ultimate success.

Participatory Mapping and Visualization is a practice of epistemology through which the spatial, temporal and relational knowledge is externalized and democratized (Gottgens & Oertelt-Prigione, 2021; Boy, 2017; Cooley, 2000). It operates with a variety of different approaches including physical sketch mapping and transect walks to the more sophisticated participatory GIS (PGIS) where communities collaborate with technicians to create layer digital maps (Vieira et al., 2019; Koc et al., 2020). They are not merely using these tools to make bottom-up assessment, but also dynamic monitoring. As an example, a community can construct a three-dimensional map of their watershed which is updated on a seasonal basis to monitor erosion, deforestation or impact of new water points where visual changes are followed longitudinally (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). The strength of this practice is that it brings about complex system relations on resource access, social exclusion and environmental change, and makes them visible and arguable. It helps to validate indigenous forms of knowledge and enable common understanding on which planning and evaluation can be built (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021). A critical tension exists between the desire for technical precision, in this case introduced by PGIS, and the accessibility and ownership of the process. This could be witnessed when technology becomes opaque that external expertise can subliminally take over again (OECD, 2016; Luijkx & Benn, 2017; Pais et al., 2019). Thus, the practice requires careful mediation to ensure that the tools are not more 'masters' to the community-led analysis.

Deliberative Planning and Indicator Co-Creation is the practice where the framework of accountability and learning is auto-generated by the stakeholders, fundamentally changing what the definition of 'results' (Agbenyo et al., 2021; Chevalier, 2019). This happens in the form of structured and facilitated dialogues that use techniques such as problem tree analysis, visioning and ranking exercises to deconstruct reported community issues and create a common theory of

change (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). From this, stakeholders co-develop indicators which have local meaning and are verifiable. These are often a combination of quantitative indicators (such as *"number of households collecting water from the protected spring"*) and qualitative but subtle benchmarks (such as *"women report feeling safer fetching water"* in the lines of collected narratives) (UN Women, 2022). This practice combines with the hegemony of externally imposed and standardized log-frames (Ishom et al., 2021; Djabbar, 2021; Weiss et al., 2016; Tallman, 2017). The methodological challenge is to fuse a number of different and sometimes conflicting priorities in a coherent framework and avoid imposing artificial consensus. Facilitators must also efficiently and effectively facilitate negotiations so that the final set of indicators is manageable and takes into account gender and other forms of social stratification, and is able to generate evidence that is credible to the community and external agencies alike. This practice establishes the contractual basis for the whole PM&E structure, and makes supplementary monitoring a process of quantifying progress against an agenda set by the community (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018).

Capacity Development for Autonomous Inquiry is the intentional practice of providing the stakeholders the cognitive and technical tools for critical self-assessment (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). This goes beyond one-off training workshops to provide a sustained mentorship model within the PM&E cycle. Capacity is developed through iterative "learning-by-doing" where community members are trained to devise simple survey tools, conduct peer interviews using locally relevant means of communication, facilitate focus group communication, and manage simple data (Kelly & Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022). A profound expression of this practice is the formation and support of a Community-Based Monitoring Team which takes longitudinal responsibility for data collection and preliminary analysis (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018). The role of the facilitator shifts from that of a trainer to a coach, then finally to a backstop resource. The great challenge is balancing such transfer of rigorous M&E concepts with the need for methodological simplicity and cultural resonance. There is a constant risk of creating a new local elite of the few that are trained. Therefore, the practice must be coupled with inclusive processes of sharing the findings and skills broadly within the community. Its success is borne out by the community's increased confidence and ability to authoritatively trigger and carry out assessments

themselves without prompting external sources (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021)

Collaborative Data Generation and Documentation puts into practice the idea of stakeholders not to be seen only as data sources but co-investigators (Costa & Andraeus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). This practice uses a large array of methods that are specific to context and often are visual and narrative-based. These include community-led surveys, photo-voice projects in which people capture problems through photography, seasonal calendars to record change throughout the year, and community diaries or storytelling circles (Vieira et al., 2019; Koc et al., 2020). The practice involves mutual participation. For example, on a transect walk, community members and a facilitator will observe and record conditions together discussing some of the causes and effects in real-time. This collaborative generation does a massive job on the validity of the data by the fact that insiders have the ability to probe on a deeper level and understand non-verbal cues when they are interpreting responses and trying to put them into context in a way that an outsider cannot (Göttgens & Oertelt-Prigione, 2021; Boy, 2017; Cooley, 2000). One of the main questions on methodology is ethical documentation, so that the process of collecting stories or images does not put individuals at risk. Furthermore, the practice needs to consciously manage power dynamic within the group itself such that during joint activities, the voices of the less powerful are not overpowered (UN Women, 2022). The nature of the data that is generated is inherently richer and more textured and creates a strong evidence base for the next stage of collective sense making (Gruba, 2024; Lebow, 1993; Tsai et al., 2023).

Participatory Data Analysis and Sense-Making is the crucible where raw information is transformed into a shared understanding and actionable knowledge (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). This practice involves groups of stakeholders in facilitated forums to systematically interpret the data that they have generated (Patton, 2023; Ramírez et al., 2017; Peterson & Skolits, 2020). Techniques such as card sorting, causal linkage diagrams, and matrix scoring and trend line analysis are used to aggregate, compare and debate results. For instance, communities could count with colored counters for differently defined components of projects, or draw diagrams that map the perceived causes of a persistent problem (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). This practice is used to purposely slow down the analytical process, to reflect,

question and incorporate experiential knowledge. It is here that the difference between correlation and causation is debated by using local logic and unintended consequences are often first identified (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). The critical task of the facilitator is to ensure analytical rigor (by checking for groupthink, foster consideration of disconfirming evidence, and help the group to move from the analysis of anecdotes to the identification of patterns) while never enforcing an external analytical frame (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). The output is not a report from a consultant. It is an interpretation that has been collectively negotiated and has the validity and commitment of the people who created it.

Iterative Learning and Communicative Reporting redefines the traditional paradigm of reporting to be a multidirectional, dialogic process of knowledge sharing and reflexive learning. Findings from the participatory analysis are first fed back to the whole community using creative and accessible ways like community meetings, forum theatre, and local radio dialogues, or illustrative posters (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). This internal loop of reporting is significant concerning verification, broader ownership and social responsibility (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). The practice also moves to the development of communicative products to external actors, where this can also involve community representatives joining the boards to co-write reports or to co-present the findings of the research to donors and government actors (Hall, 2021; Sabatini et al., 2020). This is what renders the report an advocacy and negotiation tool rather than a fixed report. Central to the practice is institutionalization of regular reflection, during which stakeholders take time to not only reflect on what they are learning about the project, but also how they are learning, as a way to critique learning and revise their own PM&E system (Ishom et al., 2021; Djabbar, 2021; Weiss et al., 2016; Tallman, 2017). The possible dissonance here is the dissonance of reconciling the subtle, even disheveled, narratives created in a participatory fashion with the success story requirement of donors seeking to have current and consistent narratives. Learning to negotiate requires some kind of an art of synergy that does not betray the analysis of that community, but at the same time effectively conveys the message of outside decision-makers (Agbenyo et al., 2021; Chevalier, 2019).

The practice making PM&E practical by leveraging analysis into negotiated commitments and

adaptive management, is known as ***Joint Action and Decision-Making*** (United Nations, 2020; Payne, 2017). After the sense-making, the stakeholders undergo a phase of priority-setting (such as a participatory budgeting simulation or force-field analysis) to convert what was found in meaningful action plans (World Bank, 2024; Budig et al., 2018). It institutionalizes community-action agreements or memoranda with implementing agencies that detail shared responsibility of ‘who does what’, ‘with what resources available’ and ‘at what time’ (Costa & Andreus, 2021). It is a practice that puts the true interest of power-holders in shared governance, and frequently, it takes advocacy to hear community-based priorities of activity that threatens the pre-established project log-frames or policies (Hall, 2021; Sabatini et al., 2020). Finally, it authenticates the complete PM&E process by completing the loop between learning and action, turning evaluation into a truly responsive and accountable tool of project management (OECD, 2016; Kissi et al., 2019).

Negotiated Action and Adaptive Management is the decision-oriented practice that closes the loop between the evaluation and implementation processes of the project, ensuring PM&E will be a driver of change as opposed to being an academic exercise (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018). Following sense making, stakeholders participate in priority setting and action planning that is structured in an appropriate way. Methods, such as participatory budgeting, where communities distribute symbolic funds to various proposed actions, or joint problem-solving workshops are used to give analysis a concrete form of action (Payne, 2017; Bonu, 2022; Budig et al., 2018). This practice includes formalization of commitments by community-action pacts or by memorandum of understanding with implementing agencies giving specific commitments or assignments of ‘who will do what’, with ‘what resources’, and by ‘when’. Crucially, it involves co-designing mechanisms on how to track these commitments, often moving from the traditional mechanism for tracking the community's work. The deep dilemma of this practice is to find the limits of community authority. This is predominantly at times where the necessary steps involve policy changes or budget approvals by higher authorities, thus such practices need to expand and include advocacy and alliance building (Costa & Andreus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). Its ultimate success is determined by observable and recorded implementation of community-prioritized actions and visible and measured responsiveness of power-holders. This forms the validation of using the entire PM&E process as

a genuine instrument of shared governance and adaptive management (OECD, 2016; Luijkx & Benn, 2017; Pais et al., 2019).

Participatory Monitoring & Evaluation Process

The foundational and continuous process of *stakeholder mapping and political analysis* is a critical diagnostic process that sets the entire political stage for PM&E (Patton, 2023; Ramírez et al., 2017; Peterson & Skolits, 2020). This process goes beyond the simple identification to nuanced analysis of power dynamics, interests and existing social fissures within the project ecology (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). It involves systematic usage of tools such as power-interest matrices and social network analysis, to help visualize factors beyond who the stakeholders are, how they are connected, who has influence over whom, and whose voices are historically marginalized or systematically suppressed. The important difference here, is that of formal stakeholders or holders of institutional interests versus rights-holders whose well-being is the ultimate ethical justification for the intervention (Vieira et al., 2019; Koc et al., 2020). The output of this process is a strategic engagement plan that intentionally engineers different types of entry points that may involve separate, safe space dialogues for women, youth or indigenous groups to ensure the voice of marginalized perspectives can be enhanced and expressed, before being "brought into broader, possibly dominated, forums" (UN Women, 2022). This phase acknowledges how the naïve stance of inviting "everyone" to participate often serves to reinforce existing hierarchies, thus the need to start with a conscious and politically aware strategy to rebalance communicative power and create conditions for genuine inclusivity (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021).

Participatory M&E Planning is an essential management and evaluation process by which all parties contribute to co-constructing the evaluation framework prior to the commencement of a project (Ishom et al., 2021; Djabbar, 2021). Facilitated conversations with the tools such as problem-tree analysis and visioning exercises enable the participants to transition to a stage of developing a collective theory of change rather than remaining at the stage of individual experience (Patton, 2023; Weiss et al., 2016). The essence of this stage lies in the common formulation of indicators which is a merged set that considers local, and, frequently, qualitative definitions of success, whilst addressing the external accountability requirements (Pham, 2018; Tallman, 2017).

This procedure creates a ‘social contract for evaluation’, clearly defining whose interests will be taken into consideration and what knowledge can be considered legitimate to redistribute power held by external log-frames by locally owned metrics (Mavrot & Pattyn, 2022; Agbenyo et al., 2021). It makes sure that the subsequent monitoring captures the change that actually matters to the community, resulting in the strong sense of ownership at the beginning (Onyango, 2018; Howard et al., 2017).

Participatory M&E Question Formulation identifies the intellectual and ethical focus of the investigation by structuring central learning questions collectively (Fischer, 2019; Vedung, 2017). It does not emphasize checking pre-established outputs but delves into issues and interests of communities and tends to open up avenues of inquiry that were not previously outlined in the project documentation (Ramírez et al., 2017; Peterson & Skolits, 2020). Question-elicitation workshops are used by facilitators to compel stakeholders to develop questions that explore more deeply into causality, equity and unintended consequences, posing not only “what was delivered?” but “who was it that worked, or did not”, and “why?” (Owen, 2020; Mertens et al., 2025). The epistemic negotiation is required to ensure that the PM&E system will support local learning agendas and contextual knowledge by changing the evaluation from a ritualistic audit into a valid community-led inquiry (Cornish et al., 2023; Keahey, 2021). The methodological problem is the balance required to narrow general community interests into questions that can be investigated without weakening their critical contribution (Brydon-Miller et al., 2020; Gruba, 2024).

The practice of ***deliberative planning and co-construction of metrics*** forms the basic negotiation on the very meaning of success and rules of evidence (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). This is where transition of stakeholders from individual experience sharing to the building of a collective theory of change is done through facilitated dialogues through techniques like problems-tree analysis and visioning exercises. The main negotiation takes place in the joint construction of indicators, which is the main cause of conflict between expert knowledge; localized knowledge; or comprehensible or coherent insights. Communities tend to focus more on qualitative evidence of change (stories of decreased conflict or increased cooperation) specifically where implementation agencies may insist on standardized quantitative measures for upward reporting (OECD, 2016; Luijckx & Benn, 2017; Pais et al., 2019). The praxis of this process is the

creation of hybrid sets of indicators that respect the local reality and meet the outside accountability requirements, for example, combining a quantitative measure of the number of clinic visits with participatory scoring of the perceived quality of service by various user categories (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). This process informs the social contract for evaluation, which is a combined technical management tool and political document, explicitly indicating whose priorities are valued and what form of knowledge is considered legitimate for evaluation of change (Ishom et al., 2021; Djabbar, 2021; Weiss et al., 2016; Tallman, 2017).

The process of *collaborative investigation and embodied data collection* are re-framing data-collection as a process of co-action that engages in the production of information in addition to solidarity, capacity, and critical consciousness in PM&E (Costa & Andreaus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). In this phase, stakeholders become co-investigators, using collaborative methods in designing tools like community-led surveys, transect walks, photo-voice, or social drama (Kelly & Reid, 2021; Van den Berg et al., 2023; Ras et al., 2022). The process places a high value on "embodied data", or knowledge acquired in sharing action and on-site interpretation. For example, having a joint walk to observe drainage problems in a neighborhood allows for "in-the-moment conversations" about cause, history, and given social equity implications, and allows for observation and understanding of deep local context (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). This methodology is a direct opposite of extractive research paradigms because this information generation is based on the wisdom of the community (Mujuru, 2018; Onyango, 2018; Urwin et al., 2023). Key operational challenges revolve around the maintenance of ethical rigor, such as informed consent and confidentiality, in peer-to-peer research as well as the certainty of a reasonable level of methodological consistency across different data collectors in the community without inhibiting local innovation and methodological contextual fit (Vieira et al., 2019; Koc et al., 2020)

Epistemic negotiation through the formulation of learning questions is the process to determine the intellectual and ethical direction of the inquiry that is embedded on what is worth knowing (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). This collaborative exercise takes the emphasis way from authenticated predetermined output data and focuses on exploring community-emergent and community-prioritized issues. Through question-elicitation workshops, stakeholders

develop central evaluation questions that challenge ‘who knows what knowledge’ that is relevant to the project. This might involve cracking open lines of inquiry which official log-frames of the project don't see. Questions progress from "Did we distribute the required number of seedlings?" to "How has the new crop variety changed the division of labor and control of part of household income?" or 'why did the community-maintained water point work in one village and not in another?' This process ensures the PM&E system serves the local learning agendas and contextual curiosity (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018). The methodological challenge for facilitators is to narrow down the often broad value-laden concerns into researchable ones without sterilizing their critical edge, making evaluation more than a ritualistic verification exercise, instead becoming a legitimate community-led inquiry into the nature, distribution and causality of change (Gottgens & Oertelt-Prigione, 2021).

Communal sense-making and assertion of interpretive authority is the central analytical process in which raw information is transformed into socially-validated knowledge using structured and facilitated dialog (Mavrot & Pattyn, 2022; Vedung, 2017; Fischer, 2019). Here is where the principle of participatory analysis is fulfilled through the use of such tools as a matrix scoring, causal linkage diagrams or trend line analysis to synthesize the collected evidence (Vedung, 2017; Fischer, 2019). The work of the facilitator is to organize a robust democratic process of deliberation, manifesting through a variety of competing interpretations by various social constituents. The lived experience of the people of the community and the local theories are explicitly used as the primary lens of analysis to test against the data collected (Patton, 2023; Ramírez et al., 2017; Peterson & Skolits, 2020). This process is a basic shift of interpretive power, which questions the traditional idea that outside observers have superior analytical insight. It recognizes the fact that data is not self-explanatory, meaning it is accredited by a social process that is embedded in local values, history, and relations of power (Owen, 2020; Mertens et al., 2025; Smith & Larimer, 2018). The output is a negotiated interpretation, a co-authored story of change possessing a tremendous legitimacy due to its foundation in the direct experience and collective reasoning of people most affected (Gruba, 2024; Lebow, 1993; Tsai et al., 2023).

The process of ***negotiated action and navigating change politics*** answers questions about the critical translation of knowledge into concrete action and redistribution of decision making power

(Payne, 2017; Bonu, 2022; Budig et al., 2018). Following the sense-making, some facilitated priority setting exercises are conducted with the stakeholders such as dot voting, participatory budgeting simulations, or force-field analysis in order to translate the analytical findings in actionable recommendations (World Bank, 2024; Wong & Guggenheim, 2018; Pham, 2018). Often the next step is likely to be the most politically charged through joint action planning and formal negotiation with institutional power-holders. This may include presentation of findings and making demands to project managers or local government representatives by community representatives in a public forum, using their own co-created data as leverage (Costa & Andreus, 2021; Goh, 2012; Speklé & Verbeeten, 2014). This process poses a test of true dedication of institutions to undertaking common authority and adaptive management. It moves past providing feedback to substantive negotiation in the construct of resources, time frames, policies, and accountability mechanism. Successful outcomes could include signed community implementation agreements or formation of actual joint oversight committees with actual authority. The process also needs to strategically be prepared for dissent and partial victories and develop advocacy strategies in cases where community-strengthened demands outstrip the immediate authority or willingness of current officials to make the evaluation strengthen material and political outcomes (United Nations, 2020; Onyango, 2018; Howard et al., 2017; Sartorius, 2018).

The integrated and reflexive process of *iterative learning and systemic adaptation* is the meta-practice through which the PM&E system itself is ensured to be dynamic relevant and responsive (Ishom et al., 2021; Djabbar, 2021; Weiss et al., 2016; Tallman, 2017). Embedded throughout the cycle and formalized at key intervals in this process which includes structured reflection sessions in which the stakeholders critically examine their own methods. They pose such questions as, "*Are our indicators still fitting the most important changes?*" or "*Is there still any place that our data collection process is not inclusive and safe for all?*" (Hall, 2021; Sabatini et al., 2020). This is a reflexive practice, sometimes called 'monitoring the monitoring', which enables mid-course correction of the PM&E framework. It institutionalizes the double loop learning. It is not only about adjusting project activities according to data (single loop learning), but also in challenging and adjusting the underlying assumptions, indicators, power arrangements (double loop learning) that steers the whole evaluation endeavor (Cornish et al., 2023; Brydon-Miller et al., 2020; Keahey, 2021). This process appreciates that communities, projects and context are not static thus an

effective PM&E system is one that is in a process of evolving in line with them. In the process, it converts PM&E from a fixed, compliance-driven protocol to a living and learning system that is more effective and legitimate over time.

The longitudinal process of *institutionalization, hand-raising and cultivation of lasting civic agency* is centered on the calculated handover and upkeep of PM&E as a lasting community capability for self-determination and accountability (Nyathi, 2021; Kissi et al., 2019; Okafor, 2021). This final phase has to do with the strategic shift from project-based participation to entrenched community practice. It is the codification of processes into the faculties of local governance. For instance, making participatory review meetings part of the annual schedule of the local council or the education of local civil society organizations to facilitate future cycles on their own (Payne, 2017; Bonu, 2022; Budig et al., 2018). Resources, including adapted toolkits, archives of data and including simple analysis guides are formally handed over to community custodians. The role of the facilitator purposely changes from a leader to a mentor, and then to a non-existent resource, phasing out dependency. The general end result is to build long-term civic agency so that the community's interest and ability to engage critically, evidence-base for advocacy and oversee its future and survive independent without any external project or donor support are established (Gruba, 2024; Lebow, 1993; Tsai et al., 2023). Its success is not counted in final report but in the community's proven capacity to independently initiate and carry out an evaluation of any new intervention, policy or leader that will impact their lives and thereby ensuring PM&E's legacy as a part of the fabric of ongoing democratic practice and self-determined development.

Participatory Utilization of M&E Results involves translating the findings of evaluations into specific actions and adaptations and making sure that communities also co-own the way forward (Nyathi, 2021; Okafor, 2021). It includes organized forums wherein stakeholders directly negotiate with project managers and power-holders, depending on their analysis, to alter plans, redistribute resources, or modify policies (Costa & Andreaus, 2021; Speklé & Verbeeten, 2014). Formalization of commitments and the creation of co-designed measures are conducted with the help of such techniques as joint action-planning workshops or public accountability forums (United Nations, 2020; Bonu, 2022). The period is highly political, as it tests the actual desire of institutions to relinquish decision-making authority and engage in adaptive management grounded on evidence

in communities (Hall, 2021; Kissi et al., 2019). Effective use is not determined by the submission of a report but by the visible execution of actions that are priorities to the community, closing the accountability loop, and justifying the entire participatory process (Goh, 2012; Mujuru, 2018).

Conclusion and Recommendations

The PM&E journey through its principles, practices and process makes it more than a methodological tool kit, but rather a profound institutional critique, and a deliberate machinery for democratic governance. This study argued that PM&E's key imperative is the recalibration of epistemic authority that is the power to define what is taken as valid knowledge, relevant success, and legitimate action in development. Its principles of empowerment, inclusivity and intersectionality augment centralizing trends within conventional monitoring while its practices of participatory mapping, joint sense-making, and negotiated action operationalize a counter-model of distributed intelligence. The cyclical and iterative process of PM&E institutionalizes the social learning approach of complexity, an approach where complexity is not seen as 'noise' to be controlled and which potentially generates adaptation, but is regarded as the necessary perspective to generate adaptation. Therefore, the ultimate conclusion is that PM&E is successful not if it produces a more accurate report for the donor, but rather if the evaluating external consultant becomes less and less needed, because the competencies and confidence for critical self-assessment was transferred to the community itself. In an era when both accountability and justice are now in high demand, PM&E is not a complementary choice. Both are required disciplines and a necessary condition for any intervention to claim both equity and sustainability, as well as responsiveness. Its wide scale adoption represents a pragmatic advancement from a paradigm of development for communities to one of development by and with communities, where the process of evaluation is shapes civic muscle and renews the social contract.

To develop this potential into more common and effective practice, the key fault lines are identified on which recommendations must address, including tension between participatory depth and bureaucratic efficiency; and the risk of co-option. First, for implementing organizations, a radical in-house change is required. It is recommended that PM&E competence should be redefined as a core programmatic skill and not a back-office function. This requires the investment of resources in long-term development of "facilitator-analysts" who are expert in managing processes,

mediating conflicts, and political maneuvering, not simply data science. Furthermore, organizations need to institutionally guard the space to do participatory learning by formally establishing dual reporting streams. One could be on streamlined, indicator-focused report for the sake of donor accountability and a separate, protected internal learning likely protected from reputational or financial penalty to document cluttered processes, failed assumptions and community critiques. This is what generates the psychological safety for true adaptation.

Second, to donors and funding agencies, the recommendation would be to structurally incentivize honesty instead of compliance. This entails transitioning from funding log-frames to funding learning agendas. Donors should require and fund specific participatory system design at the proposal phase, allow for local co-created indicators as primary measurements, and provide a specific and substantial budget line for continuous community-led reflection and process documentation. Their own reporting systems must evolve to value narrative evidence on capacity and governance changes. Examples would include such cases where community monitoring groups successfully campaigned for adjustment of policy, are given equal significance with tallies of the number of outputs. This would bring the entire funding chain back to the ideals of downward accountability.

Third, within the academic and professional institutions, it is most importantly to foster a sounder and robust practice. It is postulated that the assessment curriculum must take PM&E beyond being an elective study and locate it in the core with rigor in teaching the political and ethical elements of M&E, rather than PM&E practice. Meanwhile, research needs to shift the focus off the history of PM&E to the dynamics of how power actually changed during the transition. This entails the development of subtle frameworks of analyzing the extent of engagement and abilities to influence how to redistribute resources or power. Such information is invaluable in ensuring the ecosystem is accountable to itself regarding the principles of empowerment.

Finally, according to the policy-makers, the recommendation is strategic, as it brings PM&E to the system of public administration. This may be achieved by formal and legal incorporation of community-based monitoring information in public government performance appraisals and budgeting cycles. The creation of advocacy and participation possibilities in the social audit or

citizen report cards on basic services and lobbying governmental officials to obligatorily respond on situations of public service provision would transform PM&E from a project-based undertaking to a localized system of social participation and governmental ownership. This institutionalization, is the final maturation of PM&E, so that the role of the latter is not seen as that of a passing instrument only apt to external projects, but it is institutionalized, as an intrinsic characteristic of a responsive, responsible and participative state-society covenant.

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