

Monitoring & Evaluation Philosophy

By

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Motivation for the Topic

- The choice of the topic for this talk was motivated by my experience in the analysis of M&E job adverts in the news papers which are skewed towards candidates who have quantitative background in their education like economics, statistics, quantitative methods.
- Secondly, I was motivated to talk about this topic because few years, I engaged into a lengthy debate with one of the professor of organization psychology turned M&E scholar who refused to enroll me for a PhD in M&E because I did not have quantitative background .

Preamble

- There is scarcity of literature which discuss M&E Philosophy explicitly, scholars like Calidoni-Lundberg (2006:12) however argue that: In order to understand the development of different evaluation methods, their interactions and the reasons for choosing one method instead of the other according to the object of evaluation, it is useful to briefly **recall the philosophical tradition underpinning methodological approaches to evaluation.**

- M&E as a Discipline and a Practice must be grounded within certain **philosophical base** considering that philosophy provides the conceptual framework upon which people set what we **want to achieve and how we intend to achieve it**.
- Philosophy is the foundation of **every value system** in a society, it **defines quality of life of the people, sets the foundation and quality of every educational system** (Ardaskin, 2015).
- As contemporary M&E Scholars and practitioners, we need philosophical mind to **critically analyze** several **issues that are affecting our society** (Sadykov, Aubakirova, Berestenov, Asembai, & Aimbetova, 2015).

What is Philosophy?

- Philosophy is the study of the **fundamental nature of knowledge, reality, and existence.**
- It is the study of the **theoretical basis of all knowledge.**
- Philosophy is the universal science of knowing, learning, reasoning and understanding of issues in the most valid way. In essence, philosophy is the constant ability of people to investigate, inquire, meditate, examine, converse on issues of concern (Bartok de Malnas, 2013).

- Philosophy enable people to **understand the underlying general principles** of science and human behaviors,
- It **sharpens peoples' world view by creating theories** that can be used to **solve practical problems and also improves cognitive and communicative abilities of people** (Mark, Karabayeva & Kuntouva, 2014).

- Philosophy is an important human activity which helps people to articulate their experiences,
- It is a constant search for knowledge, meanings and quality of life;
- It is the love of wisdom and the only way through which people shape their minds and character (Suzen & Mamur, 2014).
- Philosophy guides people actions, beliefs, values and world views (Bourne, Crossfield & Nicholas, 2017).

- Philosophy is the **bedrock of human creativity**,
- It is the **lens** through which human beings view realities and **shape their beliefs** about them by **questioning and counter questioning the values** in them so as to get to the **root of the issue in question** (Durmus, 2015)

- Philosophy is the conceptual framework upon which people set their developmental agenda, goals and strategies.
- It is the **foundation of every value system in a society, it defines quality of life of the people, sets the foundation and quality of every educational system** (Ardaskin, 2015).
- Modern people need philosophical mind **to critically analyze several issues that are affecting their lives** (Sadykov, Aubakirova, Berestenov, Asembai, & Aimbetova, 2015).

M&E as an academic Discipline?

- An **academic discipline** is a branch of knowledge, that incorporates expertise, scholars who can undertake studies, researches to advance a particular body of knowledge.
- M&E as a Discipline has as its objective of generating relevant, accurate and timely data, information and knowledge that can support program development and management.

- As discipline, M&E is concern with pursuit of rigorous, cost effective ways of generating evidence that can be used in making decision to improve projects/program design and management (Elkins, 2006).
- Without proper philosophical standing, it is not possible for M&E to pursue and generate knowledge

- What philosophical school of thoughts underpin the contents taught in M&E programs at various levels of education: Certificate, Diploma, Bachelors, Postgraduate, Masters, PhD?
- What philosophical school of thoughts underpin Evaluation Theories and models like: theory of change, systems theory, Reductionism, Experimental/Quasi Experimental Models, Kirkpatrick's four-level evaluation model, Logic Model, etc?

- As a Discipline, M&E is obliged to define its philosophical stances so as to give a base to the knowledge it generates:
- M&E must define its “**Ontology**” (the nature of reality and the fundamental principles) that distinguishes it from all other disciplines;

Epistemology (Methodology):

- The term “Epistemology” has its root in two Greek words:
 - a) “ἐπιστήμη” (*epistēmē*) meaning “knowledge”,
 - b) “λόγος”, “logos”, meaning “logical discourse”

- Epistemology is a branch of philosophy which is concerned with the theory of knowing:
- What can we know?
- How can we that which intend to know?
- The way through which M&E scholars can acquire knowledge on critical aspects of M&E?
- How M&E scholars can know that, that which they intend to know about M&E is knowable?
- What is the best way of knowing M&E issues?
- Why do M&E scholars and consumers of M&E knowledge trust the way in which the M&E knowledge is generated?

- **Axiology:**
- The term “Axiology” is from Greek words:
 - a) “**ἀξία**”, “**axia**”, which literally means "value, worth";
 - b) “**λογία**”, “**logia**” which is the philosophical study of value.
 - c) Axiology studies mainly two kinds of values:
 - ethics** which investigates the concepts of "right" and "good" in individual and social conduct and
 - aesthetics which** studies the concepts of "beauty" and "harmony"

- **Axiology:**
- Axiology is concern with the nature of “goodness” which in itself is considered “value” (Schroedder, 2016).
- According to McGregor (2011), Bourne, Crossfield & Nicholas (2017), value is the ideals that shapes peoples’ mindset, perceptions, culture, conduct, actions and decisions.
- According to Luna – Parra (2008) value is the absolute goal of all human society defined by goodness, desirability and attainability of results.
- McGregor (2011) consider value to be a very critical factor in the generation of new knowledge

- There are several ethical or moral issues that underpin M&E practice and studies like:
- The value system of the M&E scholars and practitioners
- The need for privacy and confidentiality
- The possibilities of generating value free and value laden M&E knowledge
- Conflict of interest in the process of generating M&E knowledge,
- ETC.

- ***The Ontology of M&E:***
- What is the nature of reality (existence) that M&E as a discipline peruses that distinguishes it from all other disciplines?
- **M&E pursues the “existence of evidence” that can be used to track or measure development intervention in line with some agreed upon parameters (Quantitative/Qualitative Evidence)**

- The nature of reality (existence) that M&E scholars peruses is defined by the broad “philosophical school of thoughts” which the M&E scholars/practitioners/commissioners subscribe to which eventually form distinct **paradigms**.
- The main philosophical schools are:
 - **Idealist** philosophical school
 - **Realist/Empiricists** philosophical school
 - **Pragmatist** philosophical school

- **Idealism:**
- This is the philosophical school of thought that maintains that the **ultimate nature of reality** is in **the mind or ideas of people.**
- It holds that, external or real world is inseparable from mind, consciousness, or perception.
- Idealist philosophers argue that the only things knowable are consciousness or the contents of consciousness; not anything in the outside world, if such a place actually exists.

- Idealists often argue that the only real things are mental entities, not physical things and argues that reality is somehow dependent upon the mind rather than independent of it.
- Some proponents of idealism argue that our understanding of reality reflects the workings of our mind, first and foremost, that the properties of objects have no standing independent of minds perceiving them

- The main tenant of idealism is that ideas and knowledge are the truest reality.
- Many things in the world change, but ideas and knowledge are enduring.
- The most important part of a person is the mind. It is to be nourished and developed.
- Idealist philosophy give rise to relativist paradigm (**relativism** that give rise to Qualitative approach, that calls for the application of **qualitative tools** to produce **qualitative evidence**)

- **Relativism** is the view that truth and falsity, right and wrong, standards of reasoning, and procedures of justification are products of differing conventions and frameworks of assessment and that their authority is confined to the context giving rise to them.
- More precisely, “relativism” covers views which maintain that—at a high level of abstraction some class of things have the properties they have (e.g., beautiful, morally good, epistemically justified) not *simpliciter*, but only relative to a given framework of assessment (e.g., local cultural norms, individual standards),

- **Relativism** is the concept that points of view have no absolute truth or validity within themselves, but rather only relative, subjective value according to differences in perception and consideration
- From the Relative/Idealist Philosophy, we develop “**Relative Ontology**”

- Relative ontology stems from the idealist philosophy which holds that the human mind is the foundation of all realities and has the “creative and formative” ability to generate knowledge (Guyer, & Rolf-Peter, 2015).
- According to Guelke (2009) idealism gives eminence to the “human mind” because of its ability to comprehend issues and create realities.

- **Deducing from the Idealist philosophical school of thought, M&E as discipline, exist to peruse the existence of “evidence” base on ideas generated from the human minds, to track or measure development intervention in line with some agreed upon parameters (Qualitative Evidence, Qualitative data).**

- **Qualitative evidence:**
- Qualitative evidence is about information that is generally in a non-numerical form – for example, personal narratives or accounts of experiences.
- Qualitative evidence is more descriptive in nature, provides fuller, richer information that can help us better understand less quantifiable aspects, such as ‘how’ and ‘why’.

- An example of Qualitative evidence can be “significant change stories” by various stakeholders involved in a project/program. These are stories of significant changes caused by the intervention point to the critical issues in the project as viewed by the beneficiaries.
- The more significant of these stories are then selected by the stakeholders and in depth discussions of these stories take place.
- These discussions bring to the stakeholders attention the impacts of the intervention that have the most significant effects on the lives of the beneficiaries

- **REALISM**
- Another philosophical school of thought that is critical in defining M&E evidence is “Realism”
- Realism emphasizes the existence of reality outside the minds of people, like physical objects
- In particular, the term stands for the theory that there is a reality quite independent of our mind.
- In this sense, realism is opposed to idealism, the theory that only minds and their contents exist

- Aristotle (384 - 322 B.C.E.) believed that the world could be understood at a fundamental level through the detailed observation and cataloguing of phenomenon.
- By this line of thought, Aristotle argues that the world is fundamentally empirical,
- Aristotle proposed that ideas, such as the idea of God or the idea of a tree, can exist without matter, but matter cannot exist without form.
- According to Aristotle, in order to get to form, it was necessary to study material things (**the beginning of natural sciences and quantification**).

- Aristotle described the relation between form and matter with the Four Causes:
 - (a) Material cause - the matter from which something is made;
 - (b) Formal cause the design that shapes the material object;
 - (c) Efficient cause -the agent that produces the object; and
 - (d) Final cause - the direction toward which the object is tending.
- This school of thought most likely gave rise to formation of formulas

- **Realist** philosophy underpins the development of **positivist ontology** which subsequently influenced the development of **positivist paradigm** which view the existence of reality from the **physical, objective and quantification perspective**.
- **Realism/Empiricism** later influenced the development of empirical Science and physical measurement

- According to the realist/empiricist, sense experience is our only source of ideas.
- They reject the corresponding version of the Superiority of Reason thesis.
- Since reason alone does not give us any knowledge, it certainly does not give us superior knowledge.
- Realist/Empiricists generally reject the Indispensability of Reason thesis, though they need not.

- The Positivists M&E scholars/Practitioners developed a paradigm which trace their root from the realist/empiricist and they become quantitatively aligned because they believe that all M&E should be quantitative, and that only M&E which is quantitative can be the basis for valid generalizations and decision making
- To positivist one of the aim of M&E is to establish and explain causality (Cause – effect, Relationships, attribution, attrition, etc).
- Further more they content that M&E should be value-free: the choice of what to monitor and evaluate, should be determined by objective criteria rather than by human beliefs and interests.

- **Deducing from the realist philosophical school of thought, M&E as discipline, exist to peruse the existence of “evidence” base on real issues that exist independent of human mind, human mind job is to strive to understand the how the real existence presents it self, M&E scholars and practitioners only try understand evidence that can track or measure development intervention in line with some agreed upon parameters (Qualitative Evidence, Qualitative data).**

- **Post-positivism** (also sometimes called *post-empiricism*) is a paradigm that critiques and amends positivism.
- While positivists believe that M&E scholars and practitioners are independent of each other, post-positivists accept that theories, background, knowledge and values of M&E Scholars and practitioners can influence what is being investigated, hence the need for interpretation, qualification of experiences and encounters in M&E.

- Like positivists, post-positivists pursue objectivity by recognizing the possible effects of biases
- Post-positivists point out that our observations cannot always be relied upon as they can also be subjected to error.
- This is why post-positivists are considered as critical realists, who are critical of the reality that they study.
- Post-positivists do not rely on a single method of scientific inquiry. They believe that each method can have errors. These can only be avoided if a number of methods are used. This is referred to as triangulation.

- Post-positivism also assumes that the scientists are never objective and are biased due to their cultural beliefs.
- Considering the above, pure objectivity cannot be achieved. This highlights that there are vast differences between positivism and post-positivism, even though both are grounded in objectivity.

- **PRAGMATISM**

- Pragmatism was a philosophical tradition that originated in the United States around 1870. The most important of the 'classical pragmatists' were Charles Sanders Peirce (1839–1914), William James (1842–1910) and John Dewey (1859–1952).
- The root of the word pragmatism is a Greek word meaning work. According to pragmatism, the truth or meaning of an idea or a proposition lies in its observable practical consequences rather than anything metaphysical.

- Pragmatism can be summarized by the phrase “**whatever works, is likely true**”.
- Because reality changes, whatever works will also change - thus, truth must also be changeable and no one can claim to possess any final or ultimate truth.
- In other word, pragmatism is the philosophy that encourages us to seek out the processes and do things that work best to help us achieve desirable ends

- Pragmatism is also a practical, matter-of-fact way of approaching or assessing situations or of solving problems.
- Pragmatist holds that there must be a clear *distinctive rule or method for becoming reflectively clear about the contents of concepts and hypotheses: we clarify a hypothesis by identifying its practical consequences.*

- Pragmatism & post Positivist paradigm set foundation for intermediate ontological position (middle ground) between objectivism and subjectivism: Relativist) (Ansari, Panhwar, Mahesar, 2016).

- **Epistemology (Methodology):**
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 - b) “λόγος”, “logos”, meaning “logical discourse”
- Epistemology is a branch of philosophy which is concerned with the theory of knowing:
- What can we know?
- How can we know that which intend to know?

- Why do we know that which we want to know?
- Is it possible to know that which we intend to know?
- What is the best way of knowing that which we intend to know?
- Why do we believe certain claims and not others?

- In M&E, we can know issues of concern/evidence in several ways:
- 1. Direct Measurements (Quantify)
- 2. Observing and recording issues of concern (Individual view point on the occurrence)
- 3. Interviewing people (Getting perceptions)
- 4. Narration/Story telling (Allowing people to tell their stories)

- The result of our knowledge in M&E can result into several types of knowledge like:
- **Rational knowledge:**
Knowledge which is logical and can be reasoned to gain understanding.
- **Empirical knowledge:**
Empirical knowledge is based on evidence or data that can help us gain understanding. It is knowledge generated from natural scientific method of measurement (Rosander, 2016)

- **Perceptual knowledge:**
- Perception is a critical in epistemology, it is a theory of knowledge which holds that all our empirical knowledge is grounded in how we see, hear, touch, smell and taste the world around us

- **Coherent Knowledge:**
- Coherent knowledge is based on the idea that truth is a property of **a whole system of propositions** and can be ascribed to individual propositions only derivatively according **to their coherence with the whole.**
- Modern coherence theorists hold that there are many possible systems to which the determination of truth may be based upon coherence, others, particularly those with strong religious beliefs hold that the truth only applies to a single absolute system. In general, truth requires a proper fit of elements within the whole system.

- **Accepted knowledge:**
- Accepted knowledge means what which is verified, confirmed and considered truthful by the experts, it may be published or authenticated.
- Acceptability of knowledge however is not easy, due several factors like bias, ignorance, etc.

- **Learned knowledge:**
- This is knowledge acquired through the experience of individual or organization as they work and interact with people.
- Some organization deliberately decide to become a learning organization, some learn through mistakes accidents and.

- **Ecological knowledge:**
- Traditional ecological knowledge (TEK) describes indigenous and other forms of traditional knowledge regarding sustainability of local resources.
- As a field of study in anthropology, TEK refers to "a cumulative body of knowledge, belief, and practice, evolving by accumulation of TEK and handed down through generations through traditional songs, stories and beliefs. It is concerned with the relationship of living beings (including human) with their traditional groups and with their environment

Conclusion

- For M&E scholars to be effective in creating knowledge on M&E they need to understand philosophies that underpin their search for new knowledge.
- For M&E practitioners to generate right evidence that can be appreciated and utilized, they need to understand their the underlying philosophies of their perspectives.