Give More
Give Sooner
Give Better

Strengthening Philanthropy

through Monitoring and Evaluation


Picture Credits- J-PAL

We would like to acknowledge the contributors of this primer for their instrumental role in conceptualizing and providing invaluable insights. *Their expertise, knowledge, learnings from ground, dedication, and collaborative spirit have been indispensable in creating this primer.*

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SCOPE

- This primer provides philanthropists with a clear understanding of core Monitoring and Evaluation (M&E) concepts and their relevance in supporting strategic decision-making in philanthropy
- It is structured around three focus areas: embedding M&E into philanthropic strategy, supporting the broader M&E ecosystem, and strengthening M&E within non-profit organizations (NPOs)
- The primer also presents two practical frameworks — a step-by-step overview of the key stages of M&E aligned with a philanthropist's giving journey, and an actionable four-lens framework to integrate M&E into their strategy, alongside emerging trends and key ecosystem actors

What it includes:

- **M&E Fundamentals:** Explore the core concepts of monitoring and evaluation, their integration as a continuous process
- **Trends and Drivers:** Highlight the evolving forces shaping M&E in Indian philanthropy, from compliance regulations to technology and learning-focused approaches
- **Misconceptions:** Address misunderstandings on understanding M&E as a concept and a tool towards building impact
- **Key Stages of M&E:** Present a step-by-step framework aligned with a philanthropist's giving journey, with guiding questions at each stage
- **Practical Framework to Embed M&E in Philanthropy:** Introduce a four-lens framework for philanthropists–compliance, accountability, results, and scale—to integrate M&E into their giving strategy
- **Supporting the M&E Ecosystem:** Identify key ecosystem actors and opportunities for philanthropists to strengthen system-wide M&E capacity
- **Strengthening M&E within NPOs:** Explain how robust M&E helps NPOs improve their effectiveness, and outlines ways philanthropists can build and strengthen their capacity to undertake M&E processes

What it does not include:

- **Specific M&E Tool Operations**: Detailed instructions on operating specific M&E software, data platforms, or advanced technical and analytical tools
- **Step-by-Step Implementation Guides**: Comprehensive step-by-step guides for designing M&E frameworks or creating evaluation instruments

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Philanthropists can set the tone for how M&E is valued by explicitly budgeting for it and encouraging a learning mindset, not just reporting.

Neha Raykar, Director, Idinsight

Executive Summary

Key Takeaways:

- Monitoring and Evaluation, when used together as a continuous process, is enabling philanthropists in India to make more adaptive, evidence-based funding decisions
- India's M&E landscape is rapidly evolving, driven by global SDG/ESG alignment, tech innovations, and the surge in collaborative philanthropy
- A practical four-lens framework — compliance, accountability, results, and scale—can help philanthropists align their M&E efforts with the kind of impact they want to achieve
- Significant barriers remain, including underinvestment in M&E, capacity gaps in NPOs, misalignment between philanthropists and implementers, and pressure to "prove" over "improve" impact
- Philanthropists are increasingly investing in efforts to strengthen the ecosystem such as funding knowledge production, public goods, collaborative platforms, and community-led evaluation
- Strengthening NPOs' M&E systems yields better program design, real-time course correction, stronger credibility with philanthropists, and greater community trust
- Leading philanthropies — including Gates Foundation, Veddis Foundation, Rohini Nilekani Philanthropies, A.T.E. Chandra Foundation and Rainmatter Foundatiob— are demonstrating how strategic support for M&E can drive sector-wide improvement

Despite increasing philanthropic investments in India, many still lack robust monitoring and evaluation processes to ensure impactful giving

Philanthropy in India is shaped by diverse motivations — for some, giving is driven **purely by joy** and generosity, while for others it is guided by **evidence and a desire to measure impact**. Both approaches are valid, and this primer focuses on how those who choose to engage with M&E can do so effectively.

For philanthropists who **choose to engage with M&E,** it becomes a crucial tool to **maximize and scale** the impact of their giving in India's complex social landscape. M&E provides a structured way to track progress, assess outcomes, and generate learning — enabling philanthropists to **make more informed, adaptive, and strategic decisions.**

India's M&E landscape is evolving rapidly, shaped by global frameworks like the **Sustainable Development Goals (SDGs) and Environmental, Social, and Governance (ESG),** and by the rise of collaborative philanthropy that calls for shared metrics and transparency. Simultaneously, **innovations in technology, from mobile data collection to AI-powered dashboards,** are making M&E faster, more accessible, and more inclusive.

Despite this progress, misconceptions persist — many still view M&E **as a one-time reporting requirement** or believe it can be **fully objective through quantitative metrics alone**. In reality, M&E is a **continuous, context-sensitive process** that blends **qualitative and quantitative** insights to deepen understanding and drive learning.

Philanthropists have a critical role in strengthening India's M&E ecosystem — not only by embedding robust M&E within their own giving strategies but also by **supporting non-profit capacity building, funding knowledge production, enabling community participation**, and **fostering collaboration** across sectors. By doing so, they help create a culture of evidence-based philanthropy that is accountable, adaptive, and capable of achieving lasting social change.

The Power of Learning from Failure

The true value of M&E extends beyond celebrating successes to openly acknowledging and learning from setbacks. The Selco Foundation exemplifies this by its "Impact Failure" initiative, which is a conference where non-profits and funders come together to candidly discuss what did not work in their initiatives. This open sharing transforms failures into powerful learning opportunities that deepen understanding and improve program design. By fostering a culture of transparency and reflection, philanthropists can help their partners build more resilient, adaptive, and effective programs over time.

Picture Credits: Impact Failure
Source: Impact Failure

Strengthening M&E through capacity-building, collaboration, community participation, and embedding it in the giving journey can unlock philanthropy's catalytic potential

Overview of the M&E Landscape

Trends and Drivers

- **Policy & Regulation:** SDG/ESG frameworks driving accountability through impact assessments
- **Donor Expectations:** Greater demand for evidence and collaboration using shared metrics
- **From Reporting to Learning:** Shift toward decision-making, improvement, and participatory feedback
- **Technology**: Mobile data, AI, and digital platforms making M&E faster and more adaptive

Misconceptions

- M&E is often wrongly seen as just collecting numbers, but data alone cannot explain the how or why of change
- True objectivity in M&E is a myth — evaluators influence responses simply by being present
- M&E is often misunderstood as something done only at the end of a program, rather than integrated throughout its duration

Key Players

- The M&E ecosystem comprises diverse players — service providers, beneficiaries, government bodies, philanthropists, foundations, and CSRs, each contributing in unique ways

Opportunities for Philanthropic Engagement

Embedding M&E in Giving

- Philanthropists can use the key stages of an M&E process — aligned with their giving journey and supported by guiding questions — as a reference point to understand how M&E can be systematically embedded
- Applying a four-lens framework - compliance, accountability, results, and scale - can help ensure monitoring and evaluation is systematically embedded into the overall giving strategy

Supporting the Broader Ecosystem

- Philanthropists can fund organizations that produce high-quality M&E research and create shared tools to benefit the wider sector, especially smaller non-profits
- Supporting cross-sector convenings and dialogues to bring together diverse stakeholders in the M&E ecosystem
- Investing in building community capacity to facilitate its participation in M&E processes

Strengthening M&Es within NPOs

- Philanthropists can support non-profits by allocating dedicated M&E budgets, investing in staff training, and funding technology-enabled evaluation tools to strengthen in-house capabilities
- They can also advance impact by offering learning grants and enabling grantees to set and adapt context-specific outcomes in collaboration with communities

> *We are seeing a clear shift towards using rigorous evidence not just for accountability, but for decision-making and scaling interventions.*

Shobhini Mukerji, Executive Director, J-PAL

Introduction to Monitoring and Evaluation in India

Key Takeaways:

- Monitoring and evaluation are distinct but complementary processes—monitoring tracks progress in real time, while evaluation assesses whether meaningful outcomes were achieved and why
- Monitoring and evaluation is evolving — moving from a reporting obligation to a tool for learning, improvement, and strategic decision-making, with growing interest in participatory approaches and digital tools
- Despite its growing importance, misconceptions such as viewing M&E as only reporting numbers or as an afterthought, limit its potential to drive real learning and improvement

Before exploring how to apply monitoring and evaluation (M&E) in practice, it is important to understand what these terms mean and how they work together

This section introduces M&E from a philanthropic perspective — explaining their individual roles, how they complement each other, and why they matter for driving effective and accountable giving.

What is M&E?

Monitoring: Monitoring is the regular tracking of key information to see whether a project is being implemented as planned. It involves collecting data on activities and milestones to check progress against set targets. This ongoing process helps identify any delays or issues early, allowing for timely adjustments to keep the project on course.

Evaluation: Evaluation is an assessment, typically conducted during or after a program, to understand whether the intervention made a meaningful difference and why. It examines factors such as whether the program achieved its intended outcomes, how efficiently it was implemented, and whether the outcomes are likely to be sustained over time.

Synergy between the two: Monitoring and evaluation work together to help philanthropists track progress and assess whether their funding is making a difference. Monitoring provides ongoing information about whether activities are being implemented as planned, such as the number of youth enrolled in a training program. Evaluation builds on this by assessing whether those activities led to meaningful outcomes, like improved employment. Together, M&E offers the insight needed to make more informed, strategic, and impact-driven giving decisions.

Scaling Gender Equity Education Through Evidence: The J-PAL–Breakthrough Partnership

Breakthrough, a non-profit working to change gender norms, developed a school-based gender equity curriculum aimed at reducing discriminatory attitudes and practices among adolescents. Partnering with J-PAL South Asia, the program was evaluated in Haryana across 314 government secondary schools, covering over 14,000 students. The randomized evaluation found a measurable shift in students' gender attitudes and behaviors, with impacts persisting years after the intervention. Drawing on this evidence, the Government of Punjab scaled the curriculum to 6,250 government secondary schools, while Odisha is rolling it out to about 23,000 schools, expected to reach 2.8 million students.

Picture Credits: J-PAL
Source: J- PAL

Building on this foundation, the primer outlines the trends and drivers shaping how philanthropists engage with M&E in India

Trends and Drivers

Policy & Regulatory Drivers: Global frameworks such as the United Nations Sustainable Development Goals (SDGs) and Environmental, Social, and Governance (ESG) criteria are driving greater accountability in impact measurement. Institutional philanthropists and global investors are increasingly expecting alignment with these standards, pushing private philanthropy toward more rigorous impact assessment and reporting.

Shifting Donor Expectations: The M&E landscape is also being reshaped by evolving donor expectations, reflecting a clear trend towards evidence-backed giving. This is further amplified by the rise in collaborative philanthropy, which has grown nearly fivefold since 2020. Such collaboratives require shared metrics and standardized frameworks to align partners and track collective impact, accelerating the move towards evidence-based giving.

From Reporting to Learning: Philanthropies such as Gates Foundation and Rohini Nilekani Philanthropies (RNP) have started seeing M&E not just for accountability, but as a way to generate quick, actionable insights that improve decision-making and program design. There is growing interest in approaches like lean data and participatory feedback that center end-user voices and blend stories with numbers. Foundations like SELCO are leading this shift by creating space for reflection, iteration, and even failure — viewing M&E as a continuous learning tool rather than a reporting obligation.

Leveraging Technology: Digital tools are transforming M&E systems and processes. Mobile-based data collection, real-time dashboards, and tools like AI and geospatial mapping, alongside digital platforms for community-led feedback, are making M&E processes faster, more accurate, and more adaptive

Despite its growing importance, M&E is still shaped by common misconceptions that need to be addressed for it to be used effectively

Misconceptions

M&E is only about collecting and reporting numbers

Why?

Numbers can show what changed, but they rarely explain why it happened or how it can be improved. Without qualitative insights (like feedback from participants, observations, or case studies), data can give an incomplete or even misleading picture.

M&E can be completely objective

Why?

The presence of an evaluator itself influences how people behave and respond. What we get is always shaped by context, interpretation, and perspective. Acknowledging this ensures evaluations are designed with sensitivity, reducing bias and leading to more credible findings.

M&E only comes at the end of a program

Why?

Treating M&E as an afterthought misses its real value. When built in from the start and used throughout, M&E helps programs adapt in real time, course-correct, and achieve stronger outcomes, not just report results at the finish line.

> *Planning, monitoring and evaluation should be seen as an integrated process as opposed to someone planning, others monitoring or evaluating the program*
>
> ~ Dr Kaustuv K. Bandyopadhyay, Director, PRIA

Embedding M&E in Philanthropy

Key Takeaways:

- Philanthropy can be joy-driven or evidence-driven, both perspectives are valid, and neither is more important than the other
- Embedding M&E begins with choosing the right metrics that align with a philanthropist's intent, whether focused on reach, improvement, or long-term change
- The M&E process involves progressive stages from setting objectives and defining success to monitoring progress and reviewing outcomes that map closely to how philanthropists plan, fund, and assess their giving
- A practical framework with four lenses — compliance, accountability, results, and scale, can help philanthropists integrate M&E into their strategy, depending on the kind of impact they aim to create
- Common challenges include underinvestment in M&E, limited capacity, misalignment with non-profits, and an overemphasis on "proving" impact — all of which philanthropists must navigate thoughtfully to strengthen effectiveness

Not everything can be measured and not everything that can be measured needs to be measured

Trust and Joy

This giving is rooted in trust and joy — where the act of contributing itself is the reward, and relationships, belief in the grantee's vision, and minimal reporting define the approach.

Outcome and Evidence

This giving is seen as a path to measurable change — anchored in data, evaluation, and the pursuit of tangible outcomes

In philanthropy, motivations can span a wide spectrum. Neither is "better" than the other; both contribute to the fabric of social change in distinct ways. In practice, many philanthropists find themselves blending these approaches—trusting partners while also using evidence to refine and amplify impact.

For those who choose to measure, understanding and focusing on the right metrics ensures that M&E reflects what matters most - reach, improvement, or lasting change

Understanding Metrics

Output

Meaning: Immediate deliverables of the program
Example: Number of students who received tutoring

Outcome

Meaning: Short- to medium-term change resulting from the program
Example: Students show better test scores

Impact

Meaning: Long-term, sustained change aligned with the overall mission
Example: More students finish school and get jobs

Example

A philanthropist funds an after-school math and science tutoring program in rural Bihar. The output is that 500 students from Class 8–10 attend the sessions each week. The outcome is that, within a year, their average board exam scores in these subjects rise by 20%. The impact, over time, is that more students complete secondary school and qualify for higher education or vocational training, opening pathways to stable employment for their families.

Picture Credits: The Telegraph India

These metrics sit within six key stages of M&E that guide a philanthropist's giving journey

01

Defining Objective

Identifying the specific social change the intervention aims to achieve

02

Designing Program or Intervention

Defining how the intended change will be achieved

03

Deciding What Success Look Like

Selecting a small number of meaningful results that will signal whether the program is in the direction of the envisioned change

04

Setting-Up a Monitoring Plan

Determining what will be tracked, how often, and by whom

05

Collecting and Reviewing Data

Gathering and looking at progress data to see how things are going

06

Evaluating Against your Intent

Reflecting on whether the program achieved what it set out to

Embedding M&E systematically begins with defining objectives, shaping interventions, and deciding what success should look like

Key Stages of M&E → / Questions to ask ↓	Defining Objective	Designing Program or Intervention	Deciding What Success Look Like
What it means	Identify the specific social change the intervention aims to achieve	Defining how the intended change will be achieved—activities, delivery models, milestone identification and change pathways	Selecting a small number of meaningful results that will signal whether the program is in the direction of the envisioned change
When	Before selecting a non-profit partner or committing funds	Post selection of grantee/ partner and provision of funds, while working with them to shape the program	Before implementation begins, during alignment with partners
How	Support or review a needs assessment to understand the context, problems, and opportunities	Support the development of a Theory of Change to show how activities lead to impact or identify key milestones of the program	Collaboratively define three to four key outcomes and associated outputs that align with the larger objective of the intervention
Takeaways for Philanthropists	**What is the core problem or gap I want to address? What will be the consequential social change? Who should benefit, and what would change in their lives?**	**What is the strategy of the intervention to achieve the envisioned impact? Are assumptions, risks, and context factors clearly identified?**	**What outcomes will help me understand whether this intervention is creating the change I intend to make? What indicators will help me decide whether to continue, scale, or adapt my funding?**

The later stages of M&E—monitoring, reviewing, and evaluating—help philanthropists track progress and reflect on outcomes to strengthen future giving

Key Stages of M&E → / Questions to ask ↓	Setting-up a Monitoring Plan	Collecting and Reviewing Data	Evaluating Against your Intent
What it means	Determining what will be tracked, how often, and by whom	Gathering and looking at progress data to see how things are going	Reflecting on whether the program achieved what it set out to
When	Before the implementation of the program and post the finalization of the theory of change/program design	During the implementation of the program/intervention	At the midpoint or end of the program
How	A monitoring plan that includes details about data collection frequency, storage methods, and reporting expectations	Reviewing reports or discussing learnings with non-profits/partners and communities	Support an evaluation — data collection and analysis—to understand the intervention's efficacy in achieving its intended outcomes and reasons thereof
Takeaways for Philanthropists	**What information is essential to track progress? How often do I need updates to feel confident about how the program is unfolding? How will results be shared and used?**	**Are there signals that suggest this approach is worth altering or scaling? Does the data raise any concerns that I should discuss with the non-profit or reflect on in my future decisions?**	**Did the intervention achieve the outcomes I hoped to support? What insights from this evaluation can improve how I fund similar work in the future? Does the evidence suggest this approach could be strengthened, scaled, or shared with others in the ecosystem?**

The M&E process can be streamlined and enhanced through the use of specific tools tailored to different stages of a philanthropic project

Data Collection and Analysis Tools

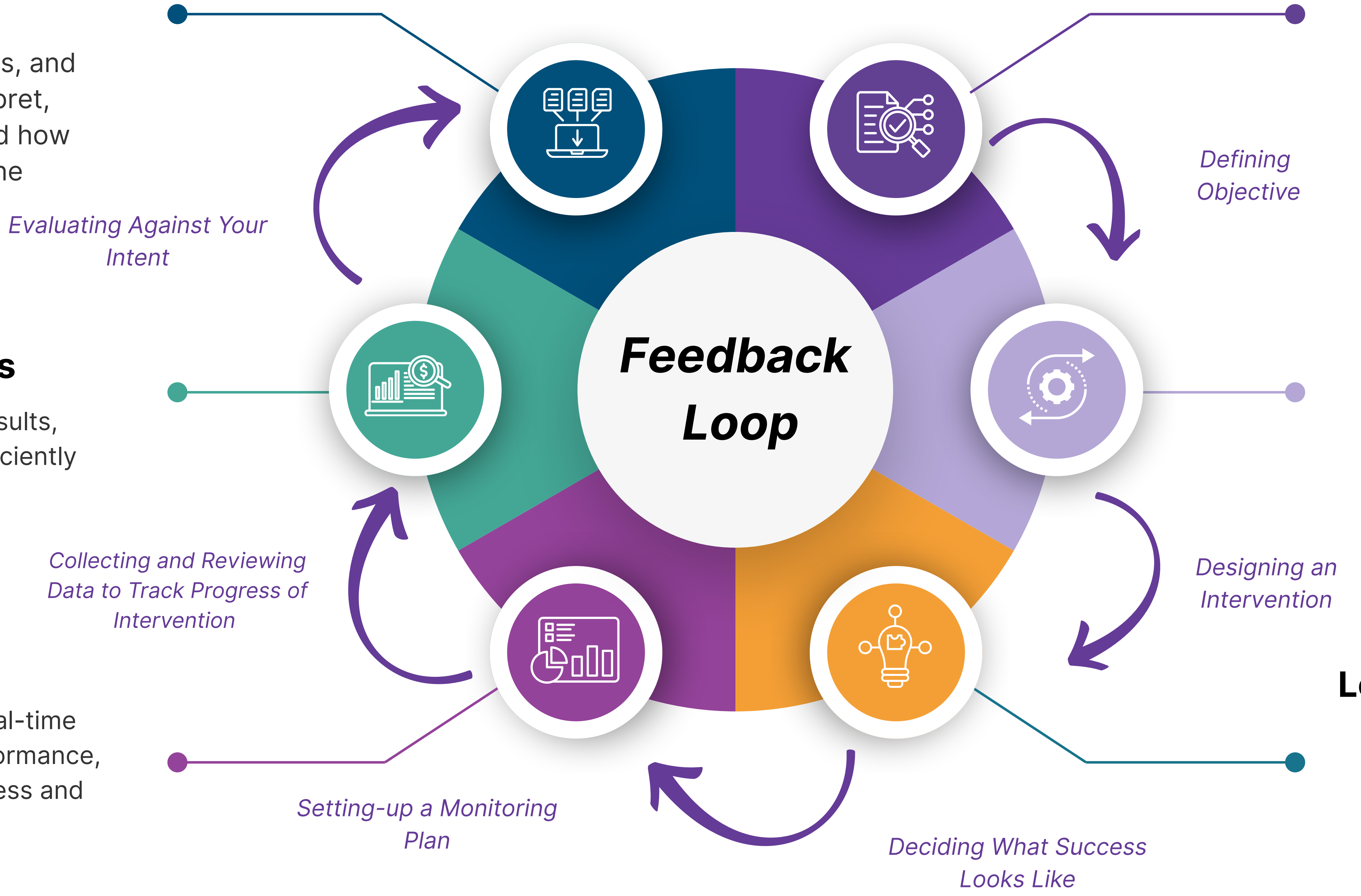
This includes surveys, interviews, and software that help gather, interpret, and visualize data to understand how the intervention has impacted the target audience

Financial Tracking Tools

Tools that connect spending to results, helping ensure funds are used efficiently and as intended

MIS/Dashboard

Digital platforms used to track real-time data on implementation and performance, making it easier to monitor progress and make timely decisions



Needs Assessment

A process used to identify key problems and opportunities before designing an intervention through surveys, review of existing data or baseline studies

Theory of Change

A visual or narrative roadmap that explains how and why a program is expected to create change, connecting its activities to the envisioned impact

Logframe (Logical Framework)

A structured table that clearly outlines a program's inputs, outputs, outcomes, and goals, along with indicators for measuring success

All these tools rely on data, which can help in various ways to undertake the different stages of M&E

How can Data Help Us?

01

Track Progress Over Time

Compare results over different periods (e.g., school attendance improved from 70% to 85% in one year)

02

Compare with Internal Benchmarks

Assess your progress against your own achievements (e.g., in one district, 90% of students attended classes regularly, while in another district under the same program, attendance was only 75%)

03

Compare with External Benchmarks

Check against sector averages (e.g., your skilling program placed 60% of youth in jobs, compared to another foundation in the same state that placed 50%)

04

Check Absolute Achievement

Ask if you reached your defined outcomes (e.g., aimed to provide clean water to 1,000 households and achieved 1,000)

To put these insights into practice, philanthropists can draw on a practical framework for embedding M&E into their giving

COMPLIANCE

Using M&E to meet regulatory or donor requirements, ensuring that reporting obligations are fulfilled accurately and transparently

ACCOUNTABILITY

Tracking whether funds and resources are being used as intended, helping philanthropists hold themselves and their partners answerable to stakeholders and communities

RESULT

Measuring whether the program's outputs, outcomes, and impact are being achieved, from immediate deliverables to long-term change,so philanthropists can assess if their interventions are truly effective.

SCALE

Using evidence and data to decide whether a program is ready to be expanded or replicated in other settings, supporting decisions around scaling successful interventions

Each lens reflects a distinct purpose M&E can serve, enabling philanthropists to align their approach with the kind of impact they seek to support

Lens	Primary Focus	Key Purpose	Commonly Used Approaches	Common Tools	Who it is for
Compliance	Fulfilling statutory or donor reporting requirements	Ensure legal or regulatory alignment and transparency in fund use	Process/ Metric-oriented, Compliance Audits	Logframes (output-focused), Compliance Dashboards	Corporate CSR teams, Government Funders, and Large Institutional Donors
Accountability	Verifying ethical and responsible use of funds and resources	Build trust with stakeholders and ensure responsible use of resources	Process/Metric-oriented	Logframes, Performance Audits	Trustees, Boards, Philanthropic Foundations, and Individual Philanthropists
Results	Assessing if the intended goals and outcomes are being achieved	Informing improvements in program design and delivery	Results-Based Management, Participatory Approaches, Theory of Change based Evaluation	Participatory Rural Appraisal, Log Frames, Mixed-methods (quantitative and qualitative), Most Significant Change (MSC), Focus Group Discussions (FGDs), Feedback Sessions	Impact-focused Pilanthropists, NGOs and Beneficiaries
Scale	Generating evidence to support program expansion or replication	Determine scalability, and replication potential based on evidence	Results-based Management, Theory of Change based Evaluation	Mixed-methods (quantitative and qualitative), Most Significant Change (MSC), FGDs, Feedback Sessions, Lean Data Methodology.	Large Foundations, Venture Philanthropists, Ecosystem Funders (e.g., multilateral banks, consortia)

Even with clear purposes, philanthropists can face challenges that make embedding M&E into their giving difficult

Over-reliance on Impact Evaluations
Philanthropists often fund rigorous evaluations (like RCTs) even when simpler, more decision-relevant tools would be more appropriate.

Underappreciation of Qualitative Data
Philanthropists tend to prioritize quantitative data for accountability, often sidelining rich qualitative insights that offer deeper understanding of stakeholder experiences and systems change.

Pressure to "Prove Impact"
M&E is still too often seen as a tool for accountability rather than learning, resulting in performative evaluations that offer little value for strategic decision-making or program improvement.

Misalignment Between Philanthropists and Implementers
There is often a disconnect between what philanthropists want to learn and what implementers need to know to improve programs, creating tension and inefficiencies in the M&E process.

Inadequate Funding
M&E is often deprioritized in budgeting, even by philanthropists, who may focus their funding on program delivery. This underinvestment constrains learning, prevents meaningful evaluation, and hinders the ability to assess what works — limiting the long-term impact of philanthropic capital.

Lack of Early-Stage Investment in M&E
Philanthropists often overlook the importance of funding needs assessments and monitoring frameworks at the program design stage, leading to missed opportunities for course correction and contextual grounding.

Limited Capacity
Philanthropists often rely on implementing partners for M&E, but many NPOs — especially in smaller geographies — lack the skilled personnel and digital systems needed to generate timely, reliable data. This limits philanthropists' ability to make evidence-informed decisions and understand ground realities in real time.

To overcome these challenges, philanthropists can follow practical tips to start embedding M&E into their giving

Start Early

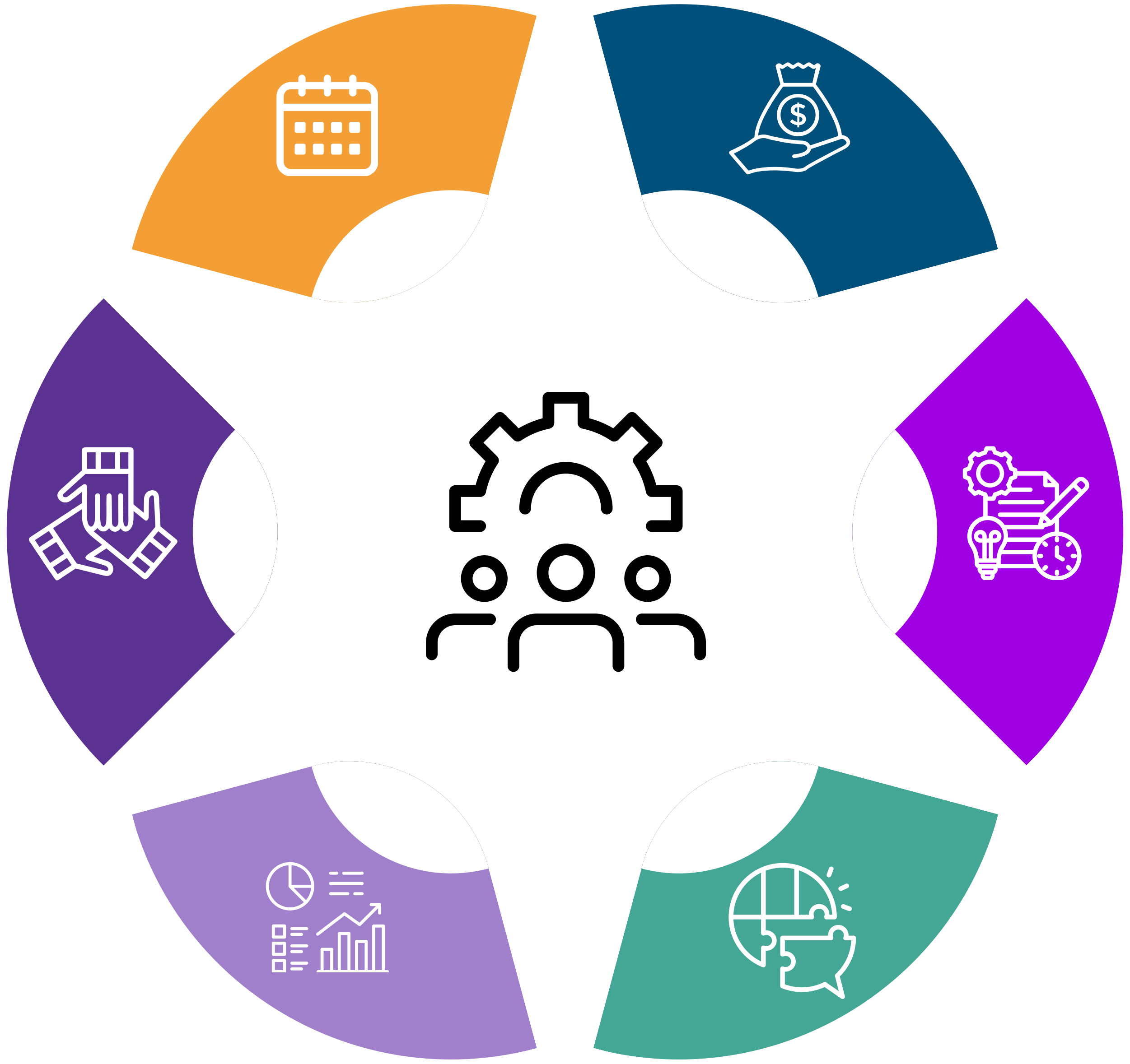
- Embed M&E into the initial program design, not as an afterthought
- It should be an integrated part of the project's foundational strategy from the very beginning

Co-create with Partners

- Involve NPOs and communities in defining what success looks like and setting metrics
- This participatory approach ensures the indicators are relevant and rooted in the reality of those being served

Set Smarter Metrics

- Focus on a theory-based approach to M&E that goes beyond simple, "glamorous" indicators
- The goal is to understand pathways of change, not just count heads



Budget for M&E

- Allocate a dedicated budget for M&E, as it is a crucial investment, not an overhead
- Experts suggest dedicating a percentage of the total budget for this purpose, with a range of 7-10% often recommended for a rigorous approach

Use Mixed-Methods

- Complement quantitative data with qualitative insights
- The most valuable M&E combines quantitative data (numbers) with qualitative insights (human stories and stakeholder feedback)

Review and Adapt

- See M&E as a tool for continuous learning
- Create feedback loops to refine programs in real-time and embrace the learning value from "failures" to drive improvements

Supporting intermediary organizations that build M&E capacity across the sector can have a multiplier effect on impact

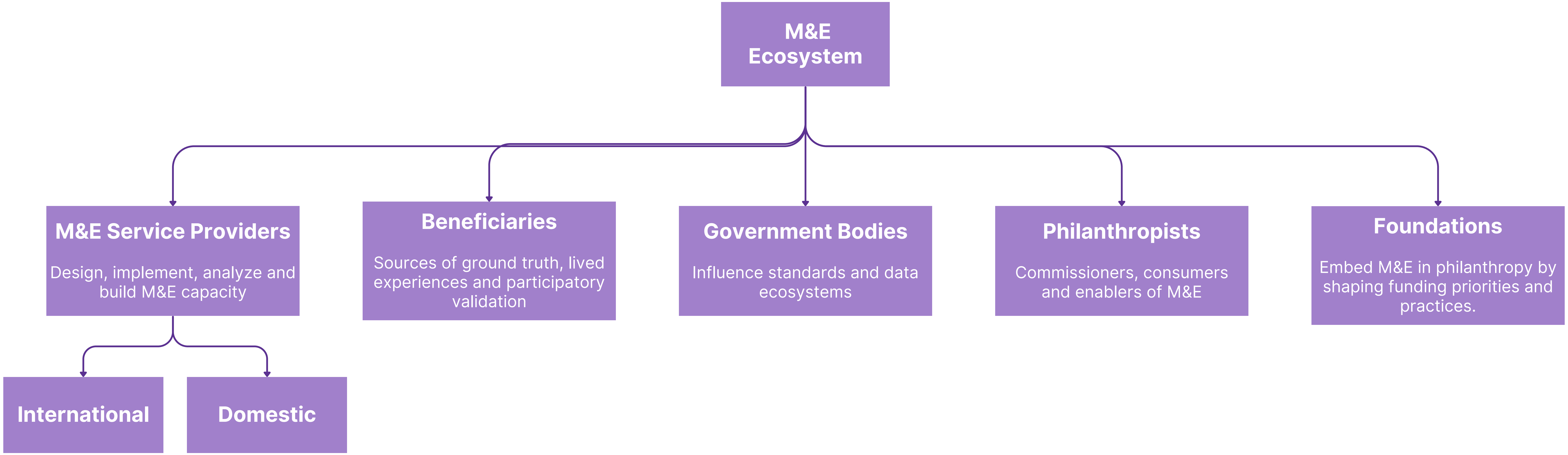
~ Neha Raykar, Director, IdInsight

Supporting the Broader Ecosystem

Key Takeaways:

- India's M&E ecosystem includes diverse players — service providers, beneficiaries, government bodies, philanthropists, and foundations— each contributing distinct capabilities to generate and use evidence
- Philanthropists can strengthen this ecosystem by funding high-quality M&E research, tools, and shared resources that benefit all sector players, especially smaller NPOs
- Supporting participatory M&E approaches ensures community voices are central to measuring and understanding change
- Facilitating cross-sector collaborations can align standards, share learning, and drive systemic improvement in M&E practices
- Providing long-term, flexible funding helps embed robust M&E systems in institutions, while community capacity-building fosters ownership and sustainable impact

To enable more strategic engagement, this section provides an overview of the key players in the M&E ecosystem



Service provider organizations are crucial in shaping India's M&E landscape as they provide specialized expertise and support

International M&E Service Providers

IPE Global is an international development consulting firm, with experience in evaluations, monitoring large-scale programs, and providing technical assistance to governments and non-profits

Based at Institute for Financial Management and Research (IFMR), Chennai, J-PAL South Asia specializes in randomized evaluations to test and improve the effectiveness of poverty alleviation programs

A global advisory, data analytics, and research organization, IDinsight works with decision-makers in India and other developing countries to help them use data and evidence to improve lives

60 Decibels is an impact measurement company that uses technology and survey tools to capture feedback from people experiencing social impact, helping organizations adapt and improve

Domestic M&E Service Providers

10x Impact Labs is a social impact consulting organization that works on M&E systems, designs digital tools, and develops tech capacity within team

Established in India, Sambodhi is a leading M&E and impact evaluation firm with a global presence, offering consulting, research, and capacity-building services

4th Wheel integrates research, M&E, and capacity building to help organizations maximize their social impact across diverse sectors

This civil society organization works to promote citizen participation and democratic governance. Its main focus areas include the promotion of participatory research, with a specialization in participatory monitoring and evaluation (PM&E) that involves communities directly in project assessment

**These are illustrative examples of organizations working in this area. This is NOT an exhaustive list or a call to action to give to these organizations.*

Additionally, government bodies and big foundations are also crucial stakeholders in the M&E ecosystem, driving accountability, compliance, and strategic impact measurement

Government

NITI Aayog | DMEO | G20

- DMEO is an attached office of NITI Aayog, mandated to monitor and evaluate the implementation of the Government of India programs and initiatives
- It works to strengthen program delivery by conducting independent evaluations, developing M&E frameworks for government schemes, and actively building the M&E ecosystem in India

Foundations

Azim Premji Foundation

- The Foundation's approach is anchored in rigorous evaluation and learning to strengthen education outcomes
- Through APRESt (Andhra Pradesh Randomized Evaluation Studies), it has institutionalized the use of randomized evaluations to assess large-scale government programs
- The initiative rigorously assessed the effects of interventions such as performance-based teacher pay, additional teachers, and health programs on rural students' educational outcomes

TATA TRUSTS

- Tata Trusts' CSR approach is anchored in M&E. They have developed a CSR Assessment Framework as a self-assessment tool to monitor and evaluate their companies' practices
- Their proprietary CSR Programme Evaluation Guidelines help their teams plan and implement evaluation exercises for their interventions
- Their DELTA (Data, Evaluation, Learning, Technology, and Analysis) framework is a prime example of their data-driven approach, used to support data-intensive planning and monitoring in large-scale government programs such as the Transformation of Aspirational Districts

**These are illustrative examples of organizations working in this area. This is NOT an exhaustive list or a call to action to give to these organizations.*

Beyond individual engagement, philanthropists can strengthen the entire M&E ecosystem by investing in knowledge, collaboration, and community capacity

Invest in Knowledge Sharing and Production

- Philanthropists can support M&E service providers by:
  - Investing in Public Goods: Philanthropists can support the creation of shared resources, such as evidence libraries, toolkits, and repositories that benefit the entire sector, especially small organizations that lack access to formal training or tools.
  - Documenting and Sharing Impact Narrative: By highlighting and investing in participatory approaches that enable documenting and sharing impact, philanthropists can inspire other community members and organizations to engage more deeply in social interventions and actively participate in understanding their change.

Facilitate Cross-Sector Collaboration

- Philanthropists can actively organize and support convenings, dialogues, and discussions that bring together diverse ecosystem players (NPOs, M&E experts, government units, and other philanthropists).
- Through their strategic investments, they can facilitate these crucial interactions for sharing learnings, aligning on M&E standards, and coordinating efforts, thereby driving systemic improvement in M&E practices.

Encourage Patient Philanthropy for System Embedding

- M&E systems need time and trust to be embedded, especially within government institutions or collective platforms. Philanthropists can play a key role by providing long-term, flexible support to nurture such systems over years, not months.

Build Community Capacity for M&E and Empowerment

- Philanthropists can invest in building the capacity of communities, especially marginalized groups, to participate meaningfully in the design, monitoring, and evaluation of programs. This includes training community members in basic M&E tools, promoting participatory methods, and recognizing community-led monitoring as a valuable source of insight.
- These investments contribute to institutional sustainability—what is left behind after an intervention—and reinforce the shift from dependency to community ownership and long-term impact.

> *Smaller organizations often lack the systems and skills to do M&E well — philanthropists can bridge that gap with capacity-building support*

Swapnil Shekhar, Co-Founder and Director, Sambodhi

Strengthening M&E within Non-Profit Partners

Key Takeaways:

- Strong M&E enables NPOs to define their intended social change, design effective programs, and ensure alignment with community needs
- By tracking progress and adapting strategies in real time, M&E improves program effectiveness and operational efficiency
- Evidence from M&E builds NPO credibility, strengthens advocacy, and helps secure future funding and scale opportunities
- Transparent, participatory M&E fosters accountability, trust, and long-term sustainability with both philanthropists and communities
- Philanthropists can support NPO M&E by funding dedicated budgets, building team capacity, promoting tech-enabled tools, and offering flexible, learning-oriented grants
- Allowing NPOs to co-create and adapt indicators with communities ensures relevance, reduces donor-imposed rigidity, and promotes authentic impact measurement

Strong M&E systems enable NPOs to improve programs, build credibility, and drive lasting impact

Define Social Change

Strong M&E helps NPOs define what change they aim to achieve and why, ensuring that programs are rooted in a clear theory of change and aligned with shared goals.

Improve Program Effectiveness

M&E helps NPOs track progress, identify roadblocks early, and adapt strategies in real time. This leads to better outcomes, more efficient implementation, and ensures that interventions stay aligned with community needs.

Strengthen Credibility & Unlocks Future Funding

By generating solid evidence of impact, M&E helps NPOs demonstrate what works. This builds credibility with philanthropists, supports advocacy, and strengthens the case for scaling and long-term support.

Build Accountability and Trust

Transparent, participatory M&E practices strengthen accountability to philanthropists and communities, promote local ownership, and support long-term sustainability.

By supporting NPOs' M&E systems, philanthropists help make programs more effective, adaptive, and impactful

Allocate Adequate Resources for Grantees' M&E: Philanthropists can explicitly allocate dedicated and sufficient budgets within project grants for M&E activities. This ensures NPOs can invest in quality data collection, analysis, and reporting.

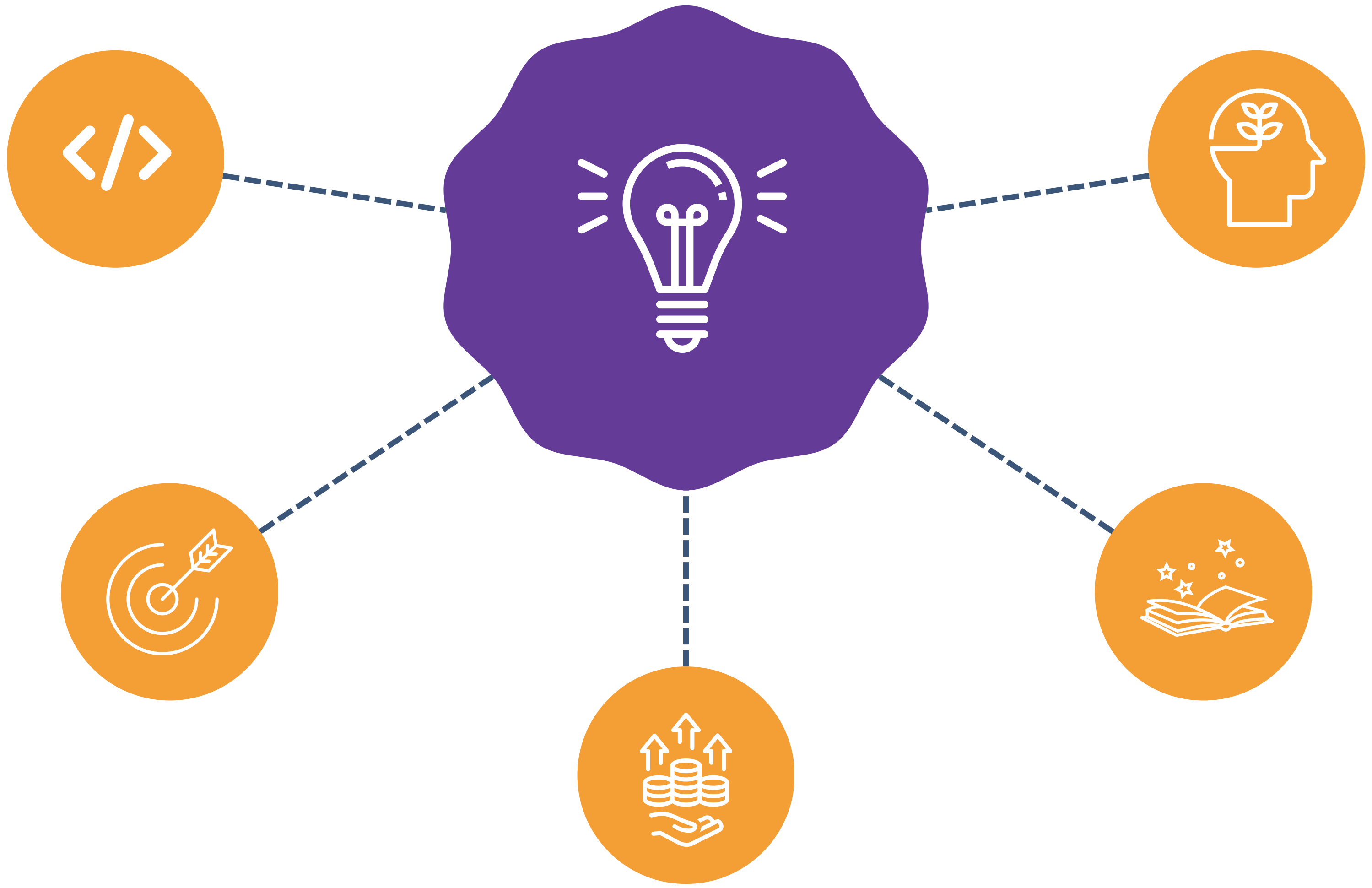
Conduct Capacity Building for NPO Teams: Investing in the training and professional development of NPO teams in M&E methodologies and tools is crucial as it enables organizations to build their in-house capacity.

Invest in and Promoting Tech-Enabled Evaluation Tools: Philanthropists can support the development, adoption, and training of accessible, user-friendly M&E technologies.

Provide Learning Grants: Instead of mandating one-size-fits-all evaluation formats, philanthropists can offer learning-oriented grants, giving organizations the flexibility to choose the most useful type of evaluation based on their stage, context, or decisions at hand.

Allow Flexibility for Grantee-Led Outcomes: Philanthropists can empower NPOs by allowing them flexibility to define and adapt their own output and outcome indicators in collaboration with communities. This approach relieves the burden of rigid donor-mandated outcomes and encourages genuine impact measurement that is relevant to the local context.

Following these simple tips can make it easier for NPOs to share their MEL strategy with philanthropists



Embed M&E in Strategy, Not as an Add-On

Position your M&E framework as an integral part of your program's design from the very beginning, not as an afterthought

Propose a Fit-for-Purpose Approach

Propose an M&E approach that is a strategic and cost-effective fit for your program's specific stage and learning needs

Ask for Dedicated M&E Funding

Advocate for a separate budget line for M&E, framing it as a key investment in the program's effectiveness, not an overhead cost

Show Your Learning, Not Just Your Success

Emphasize that your M&E is a tool for continuous improvement, demonstrating your commitment to learning by openly sharing insights gained from both successes and challenges

Balance Numbers with Stories

Combine quantitative metrics with qualitative insights to provide a holistic view of impact that is both credible and compelling

Evidence, combined with economic and contextual insights, and informed judgment, plays a central role in guiding strategy and portfolio execution

Suneeta Krishnan - India Country Office Deputy Director, Gates Foundation

Indian Philanthropists and their Philanthropy

Key Takeaways:

- ATECF and the Gates Foundation stress funding nonprofit core capacities, treating MEL as essential for effectiveness
- RNP and the Gates Foundation promote M&E as a continuous, collaborative learning process beyond one-time evaluations
- Veddis Foundation embeds M&E through structured frameworks, evidence-based grantmaking, and government partnerships
- Rainmatter Foundation balances metrics with stories, using patient, context-sensitive approaches and ecosystem-wide learning
- Together, these philanthropies underscore the importance of investing in people, data, and systems to enable long-term, sustainable change.

A.T.E Chandra Foundation (ATECF)

Area of Work: M&E Capacity Building

This foundation emphasizes on building the core capabilities and resilience of non-profit organizations (NPOs) and grassroots organizations. As part of this commitment, they actively advocate for and support strategic investments in robust M&E systems as a crucial component of organizational effectiveness. For instance, they are an anchor partner of the "Pay-What-It-Takes India" initiative, which champions funding NGOs for their full costs, including essential M&E capacities.

Their Approach and Work

- A.T.E. Group **regularly publishes impact assessment reports**, such as those reviewing learning & development programs in India, signaling that they see **value in measuring the outcomes of their initiatives.**
- The Foundation embeds robust M&E frameworks, including **partner-specific need assessments, milestone tracking, dashboards, and quarterly check-ins to measure grant effectiveness.**
- ATECF has shifted from funding NGOs to **prioritizing institution-building and ecosystem development,** with a strong focus on capacity building — including **strengthening M&E capabilities.**

Rohinin Nilekani Philanthropies (RNP)

Area of Work: M&E Resourcing

Rohini Nilekani Philanthropies encourages NPOs to view M&E as a continuous learning process, moving beyond traditional, end-of-program assessments. They advocate for NPOs to embrace a holistic approach, using diverse metrics that capture both tangible and intangible impacts across the full scope of their work.

Their Approach and Work

- The RNP views impact as both tangible and intangible, and as **occurring at different speeds**—from fast, concrete outcomes to slow-emerging systemic shifts. This acknowledges that **social change is complex and often non-linear**.
- **Regular field visits** are used not for oversight, but as **learning opportunities** — enabling deep understanding of grantee challenges and informing more empathetic grant-making.
- Through capacity-building grants, RNP invests strategically in **strengthening grantee organizations' Monitoring, Evaluation, and Learning (MEL) systems**, particularly resourcing them with training, tools, and expert facilitation.
- RNP **commissions external evaluations and learning projects**—such as studies on welfare delivery, civil society governance, and criminal justice—furthering sector-wide understanding and their learning ecosystem.

The Gates Foundation

Area of Work: M&E Intergrated Approach

The Gates Foundation views monitoring and evaluation as an important learning tool to inform fundamental understanding and decision making and improve outcomes of its initiatives. They have a dedicated policy on evaluation, wherein they emphasize a collaborative approach to gather feedback and adjust strategies for optimal impact.

Their Approach and Work

- The Gates Foundation outlined in **"A Guide to Actionable Measurement"**, their emphasis on **evaluation with intent:** collect data that informs decisions. They focus on **measuring what matters** and **adapting strategies** based on results.

- They aim to **integrate learning and evaluation into the fabric of their work**, achieve early alignment with partners about what they are evaluating and why, and generate evidence that is useful to a achieving the intended outcomes.

- The foundation prefers to **strengthen domestic grantee and partner M&E systems rather than create parallel ones** —sometimes investing in **national capacity building efforts** to support country and global goals.

- Program directors actively **use evaluation data to inform their decisions and strategy**. Findings are transparently shared internally and externally to build institutional knowledge and drive improvements in **program design and learning opportunities.**

Veddis Foundation

Area of Work: Evidence-Led Strategic Philanthropy

Veddis Foundation, founded by Vikrant Bharagava, views monitoring and evaluation as essential for building scalable and sustainable social impact. They approach philanthropy with a venture mindset, emphasizing evidence, measurement, and institutional learning as critical tools to guide decision-making and ensure accountability.

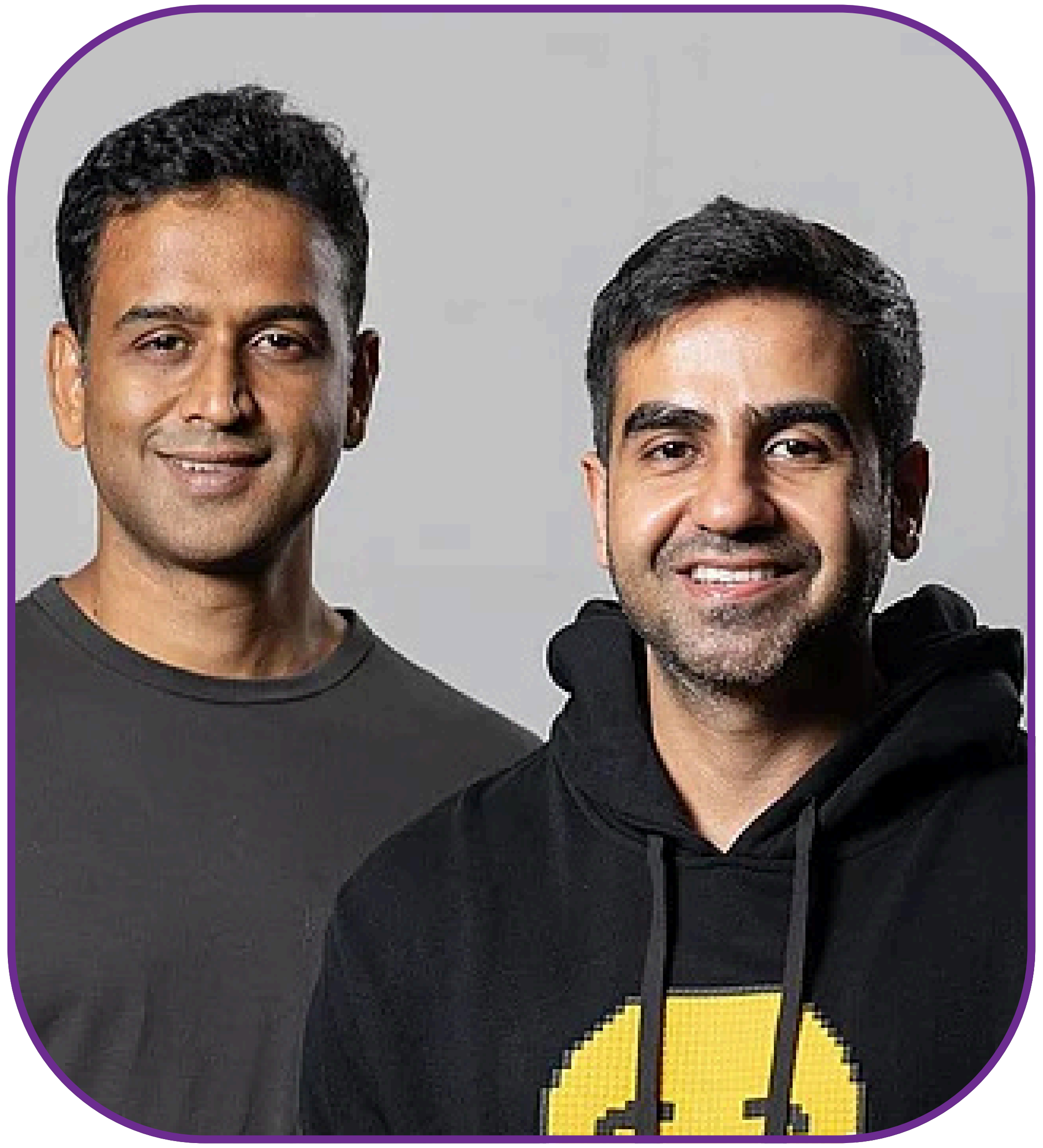
Their Approach and Work

- Veddis integrates structured M&E frameworks into all their partnerships, **using milestones, learning reviews, and outcome tracking** to ensure alignment with long-term systemic goals.
- They emphasize **evidence-based grantmaking**, providing catalytic, multi-year funding tied to measurable outcomes rather than short-term project activities.
- The Foundation collaborates with government partners and NPOs to strengthen institutional capacity for **data-driven governance, embedding M&E as a core part of delivery systems**.
- Their grant management process includes **dedicated pipelines and technology platforms** that enable systematic monitoring, continuous learning, and transparent reporting.

Rainmatter Foundation

Area of Work: Patient, Evidence-Grounded Climate Philanthropy

Rainmatter Foundation views M&E as a balance of patience and evidence. It values storytelling and lived experiences as much as quantitative data, recognizing that climate and environmental change is complex, slow-emerging, and deeply context-driven.



Their Approach and Work

- Rainmatter believes impact cannot always be captured through immediate numbers, and encourages grantees to combine **narrative stories with quantifiable metrics** to reflect both lived experience and evidence.
- The Foundation emphasizes a **patient capital approach,** giving grantees space for long-term experiments to mature rather than pushing for quick outcomes.
- Their **M&E practice is context-sensitive**, aligning measurement with local realities and acknowledging that change is often non-linear.
- Rainmatter positions itself as an ecosystem enabler, **supporting data-sharing, coalitions, and knowledge platforms** that help scale learning across the climate sector.

> *M&E works best when philanthropists see it as an enabler of impact, not just a mechanism to check boxes*
>
> ~ Malavika Rangaranjan, Senior Associate, 60 Decibels

Subject Matter Experts

Key Takeaways:

- Diverse Perspectives: Experts from research institutions, consulting firms, and practitioner networks underscored the value of blending rigorous evaluations with participatory and adaptive methods to strengthen India's M&E ecosystem
- Embedding M&E Early: SMEs stressed the importance of integrating M&E at the program design stage — rather than treating it as an end-stage activity — to enable contextual grounding, timely course correction, and more relevant impact measurement
- Capacity & Resource Gaps: Philanthropists often underinvest in NPOs' internal M&E capacity, overlook early-stage research, and prioritize delivery over evidence generation — limiting learning and long-term impact
- Catalytic Role for Philanthropists: Philanthropists can accelerate sector-wide improvement by funding needs assessments, promoting learning-oriented evaluations, investing in tech-enabled tools, and fostering collaboration on shared metrics and standards

This primer is shaped by insights from leading practitiones and experts

Suneeta Krishnan

Deputy Director for Strategy, Planning & Management, Evaluation, Gates Foundation

Suneeta oversees strategy, financial planning, business operations, and measurement, learning, and evaluation for the foundation's India Country Office. She supports teams to use data and evidence to refine their strategies and program implementation and advance gender and diversity, equity, and inclusion goals, and also manages grantmaking to enhance research and evaluation capacities in India.

Dr. Kaustuv K. Bandyopadhyay

Director, Participatory Research in Asia (PRIA)

Dr. Kaustuv K. Bandyopadhyay is the Director of the Society for Participatory Research in Asia (PRIA), a leading civil society organization advancing citizen participation, democratic governance, and civil society development since 1982. With nearly three decades of experience, he has led national and international initiatives on social accountability, participatory governance, and organizational strengthening, with expertise in participatory learning, monitoring and evaluation, and strategic planning.

Neha Raykar

Director, Idinsight

Neha is the director at Idinsight, with over 14 years of development research experience in India, specializing in monitoring, evaluation, and learning (MEL) partnerships across maternal health, child nutrition, health systems, and adolescent health and education. She holds a PhD in Economics from the University of California, Riverside, and is a Senior Fellow of the Atlantic Fellows for Health Equity program at George Washington University.

..who helped with the identification of challenges, opportunities, and ways philanthropists can strengthen M&E

Shobhini Mukerji

Executive Director, J-PAL

Shobhini Mukerji is the Executive Director of J-PAL South Asia, where she leads operations and partnerships to strengthen the use of evidence in policymaking. With deep expertise in research design, large-scale data collection, and evaluation strategies, she works closely with governments, donors, and civil society to integrate rigorous monitoring and evaluation into program design and scale-up.

Swapnil Shekhar

Co-founder and Director, Sambodhi

Swapnil Shekhar is the Co-founder and Director of Sambodhi, with over two decades of experience in international development. He has led large-scale evaluations for global philanthropies, governments, and development organizations, and drives Sambodhi’s strategic growth and vision for evidence-driven impact. A Rockefeller Foundation Global Fellow, Swapnil is currently spearheading initiatives in advanced analytics to integrate data science and technology into policy and development.

Malavika Rangaranjan

Senior Associate, 60 Decibels

Malavika is a Senior Associate in 60 Decibels’ India team. She specializes in their agriculture portfolio and has led engagements with key clients like Bayer Corporation, The Gates Foundation, Small Foundation, among others. Before 60 Decibels, she worked with Samhita Social Ventures and led key engagements with corporations supporting social protection and livelihood revival programs after COVID-19. She holds a B.A. (Liberal Arts) in Sociology from Symbiosis International University.

> *Digital tools are transforming how we collect, analyze, and share data — making it faster, more reliable, and more accessible to decision-makers.*
>
> ~ Swapnil Shekhar, Co-Founder and Director, Sambodhi

Resources

Key Takeaways:

- Strategic M&E for Impact: Beyond mere compliance, the resources highlight that Monitoring, Evaluation, and Learning (MEL) is a strategic tool for non-profits to drive continuous improvement, learn from both successes and failures, and build a compelling case for their work.

- Investing in Grassroots Capacity: Several resources emphasize that sustainable social change is achieved by strengthening the core capabilities of grassroots nonprofits. This includes building robust M&E systems, fostering an organizational culture of learning, and investing in human capital to empower local organizations for long-term effectiveness.

- Shift to Learner-Centric and Inclusive Philanthropy: The resources point to an evolving philanthropic approach that prioritizes listening, equity, and a willingness to learn. This new model moves away from top-down, abstract funding to a more collaborative and evidence-based practice where philanthropists embrace failure as a part of innovation and engage directly with communities.

Here are key resources that philanthropists can draw on to strengthen their understanding of M&E

- **Budget Allocation for Monitoring and Evaluation (M&E) – evalcommunity.com:** Explores the best practices for allocating funds for M&E activities within donor and non-profit organizations to ensure effective tracking and impact measurement.
- **Capacity Building for Grassroots Nonprofits – IDR Online:** This series of articles led by ATE Chandra Foundation, highlights the importance of investing in the core capabilities of grassroots non-profits. It includes case studies on organizational culture, data management, and M&E systems.
- **Case Study: The Importance of Nonprofit M&E Systems – IDR Online**: A case study that demonstrates how a robust M&E system helps a non-profit organization to improve its programs, ensure accountability, and communicate its impact to stakeholder.
- **Connection, Not Abstraction – IDR Online:** Rethinks philanthropy by advocating for a shift from abstract, top-down approaches to a more connected, human-centered model that values relationships and local context.
- **Evaluation Policy – Gates Foundation:** This page outlines the foundation's comprehensive evaluation policy, which aims to align expectations, foster a strategic approach to evaluation, and promote learning from both successes and failures to maximize impact.
- **HCL Foundation – HCL Foundation:** This link directs to the "About Us" page, which details the foundation's mission, vision, and key areas of focus, along with their emphasis on measuring impact strategically.
- **How philanthropists Can Support Meaningful MEL – BetterEvaluation**: Provides a "new pathway" for philanthropists to shift from traditional compliance-driven M&E to a more meaningful, collaborative, and learning-oriented approach.
- **Incorporating Equity into Measurement, Evaluation, and Learning – The Bridgespan Group**: This insight explores how non-profits can integrate principles of equity and inclusion into their M&E practices to ensure that data collection and analysis are fair and representative
- **India CSR Assessment Framework – Tata Sustainability:** Outlines a structured framework for assessing and evaluating the effectiveness and social impact of CSR initiatives.
- **India CSR Outlook Report 2023 – Outlook India**: Analyzes trends and provides an overview of corporate social responsibility spending in India, along with highlighting the gap in capacity of NPOs to undertake M&E processes.

These references provide practical frameworks, case studies, and guidance for embedding M&E into philanthropic practice

- **Interactive Curriculum to Reshape Gender Norms – J-PAL:** A case study highlighting an evidence-based intervention designed to address and reshape harmful gender norms within a specific context.
- **Impact Failure – Selco Foundation:** This platform, which hosts the "CONCLAVE" events, focuses on the importance of learning from failures in social impact work. It promotes the idea of embracing missteps as a crucial part of innovation and resilience.
- **M&E for System Innovation** – Wageningen University & Research (WUR): Discusses how monitoring and evaluation can be adapted to contribute to systemic change and innovation, moving beyond traditional project-level assessments.
- **Participatory Research in Jharkhand – IDR Online:** This article shares lessons learned from using participatory research methods, highlighting the value of involving communities in the research process to ensure relevance and ownership.
- **Rohini Nilekani Philanthropies Approach – Rohini Nilekani Philanthropies**: This page outlines the philanthropic approach of the organization, focusing on principles of "Connected, not abstracted" and "small is beautiful" to empower local communities along with their view of M&E as a continuous learning process.
- **Social Impact Assessment – 4thWheel Social Impact**: This article provides a foundational understanding of social impact assessment (SIA), explaining its importance and methodology in measuring the non-financial outcomes of projects.
- **The Importance of Listening – Forbes India**: A blog post discussing the critical role of listening and open communication in building productive relationships between philanthropists and the communities they serve.
- **The Unique Value of Aid and Philanthropy – J-PAL**: A blog post from the J-PAL that outlines four essential roles of aid and philanthropy, emphasizing the importance of evidence-based approaches.
- **What is Evidence-Based Philanthropy? – Impactful Giving:** This article provides a clear explanation of evidence-based philanthropy, emphasizing the use of rigorous data and research to inform funding decisions and maximize social impact.

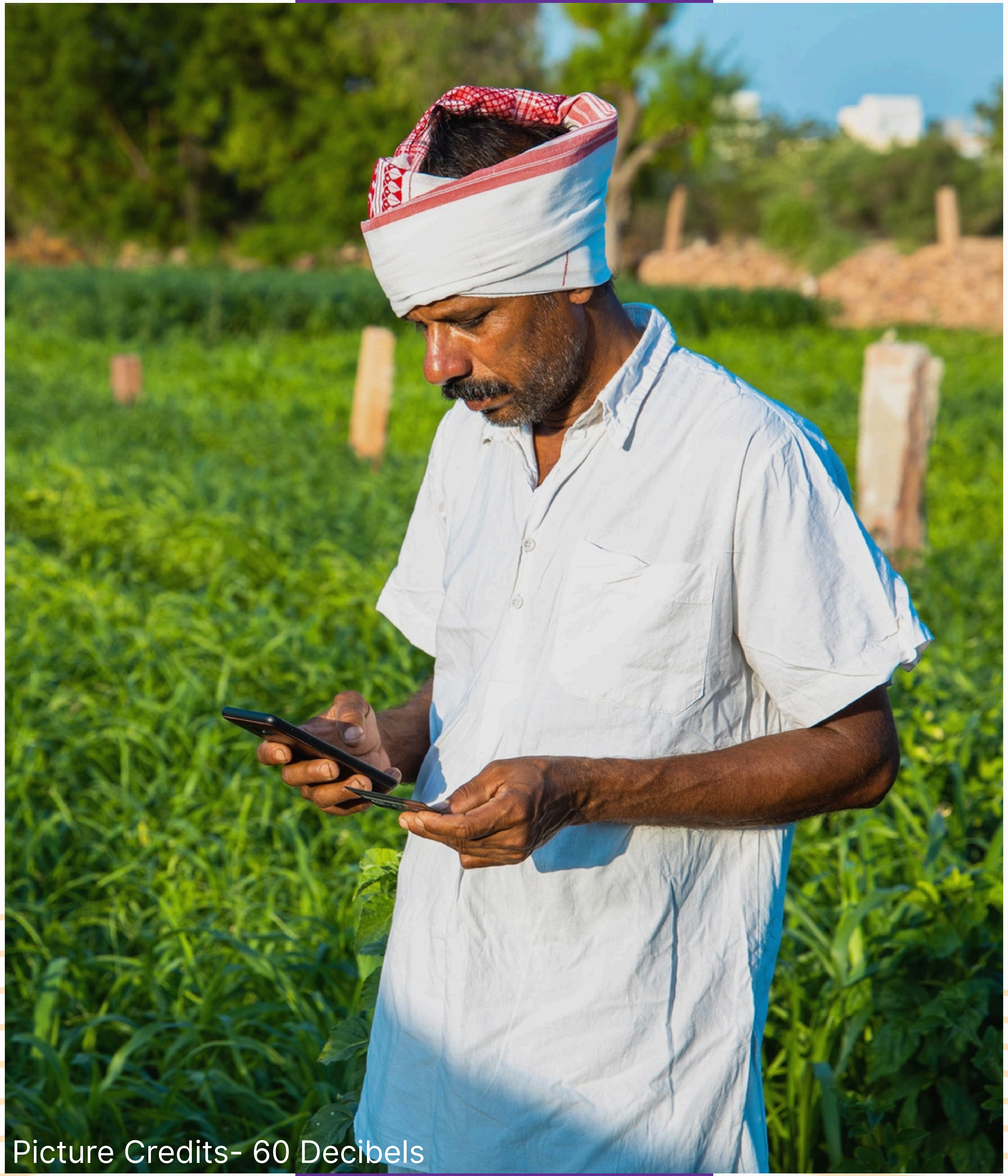
This glossary complements the resources by clarifying key M&E terms used in the primer for easier understanding and application

Glossary

- **Accountability:** Ensuring funds and resources are used responsibly and transparently to build trust with stakeholders
- **Catalytic Grant:** Flexible funding that helps organizations test, adapt, and scale approaches, with learning and evidence at the core
- **Compliance:** Meeting statutory, legal, or donor reporting requirements through accurate tracking and documentation
- **Compliance Dashboards:** Digital tools that display whether reporting and regulatory obligations are being met in real time
- **Data Collection & Analysis Tools:** Surveys, interviews, and software that help gather and interpret information to understand the progress and impact of an intervention
- **Exit Strategy:** A planned approach for responsibly winding down funding while ensuring the program's sustainability
- **Feedback Sessions:** Structured opportunities for beneficiaries or stakeholders to share their views on a program's progress and effectiveness
- **Financial Tracking Tools:** Systems that connect spending with results to ensure funds are used efficiently and as intended
- **Focus Group Discussion:** Guided conversations with a small group to gather in-depth insights on experiences, perceptions, and outcomes
- **Impact:** The long-term, sustained change created by a program, such as improved health, education, or livelihoods
- **Indicator:** A sign or measure, often numeric, that shows whether progress is being made toward an intended result
- **Learning Grant:** Funding that allows NPOs to experiment and adapt, focusing on lessons learned rather than rigid outcomes
- **Lean Data Methodology:** A quick, low-cost way to collect feedback directly from participants to improve programs in real time

Together, these terms provide a quick reference to navigate the concepts and frameworks used throughout the primer

- **Log Frame (Logical Framework):** A structured table linking inputs, outputs, outcomes, and goals with indicators to track progress
- **Milestone Tracking:** Monitoring key steps or events to see if a program is moving in the right direction
- **MIS/Dashboards:** Digital platforms that track and display real-time data on program implementation and performance
- **Monitoring:** The ongoing tracking of activities and progress to see if a project is being implemented as planned
- **Most Significant Change (MSC) Stories:** A qualitative method where participants share personal stories of change to highlight impact.
- **Needs Assessment :** A study conducted before a program to identify problems, gaps, and opportunities in a community
- **Outcome:** The short- or medium-term change resulting from a program, such as improved test scores or job readiness
- **Output:** The immediate deliverables of a program, such as the number of people trained or households reached
- **Participatory Rural Appraisal (PRA):** An approach where community members actively assess their needs and progress
- **Performance Audit:** A review that checks whether resources are being used effectively and as intended
- **Results-Based Management (RBM):** A way of planning and managing that focuses on achieving measurable results
- **Reverse Roadmap:** A planning method that starts with the desired long-term change and works backward to define steps and indicators
- **Scale –** Expanding or replicating a program, based on evidence that it works, to reach more people
- **Theory of Change (ToC):** A visual or narrative roadmap that shows how activities are expected to lead to desired impact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...contribute knowledge resources pertinent to the cause

...share your perspectives and exchange ideas on the cause

...explore how philanthropy can make an impact in the cause