

The Essence of Monitoring and Evaluation Systems for Good Governance of Catholic Institutions in Zambia

Jonas Phiri

*National Liturgical and Biblical Coordinator, Zambia Conference of Catholic Bishops,
Catholic Secretariat, Lusaka, Zambia*

Abstract

Monitoring and evaluation (M&E) are a process that involves collecting and analysing data to measure progress toward achieving specific goals and objectives. This process helps organisations to identify what is working and what is not and to make informed decisions on how to improve their programs and projects. This paper focuses on the necessity of M&E in Catholic institutions in Zambia, Lusaka in particular. It underscores the fact that there is no good governance in these institutions due to inadequate M&E mechanisms. The only means of M&E are meetings. The research was done in Lusaka District and some parts of Central Province. It was conducted in 7 institutions. The sample size was 257. There were 252 questionnaires which were administered purposively and randomly to those in the first line, middle and top leadership, and management positions, and 5 in-depth interviews were carried out purposively. It identifies the causes of poor governance as inadequate results-based M&E systems, deficient focus on Key Result Areas (KRAs) and Key Performance Indicators (KPIs), and irregular monitoring of institutional activities. The recommendations were that there was need to build capacity in the areas of performance management, stewardship approach to management (good governance), and to enhance M&E systems. Theoretically, the results can be generalised to all Catholic institutions in Zambia.

Keywords: *Catholic Institutions, Good Governance, Key Performance Indicators, Key Result Areas Monitoring and Evaluation, Stewardship.*

Introduction

The Church is not a business, but it does have a stewardship responsibility to ensure that all its resources are used as effectively as possible to carry out God's work on earth. For a variety of reasons, the Church has lagged well behind other organisations, including other non-profits, in its willingness to address this critical issue [1]. Peter Drucker says that nonprofits such as the Church need to be managed for results and performance, not just good intentions; and that organizational skills would be needed [2].

Good governance or good stewardship is a huge challenge in Catholic institutions. This is because Catholic institutions run without proper

direction and accountability measures, are devoid of systems of assessment in terms of successes and challenges and are deficient in the means of determining efficiency and effectiveness. One way of addressing this is through M&E. M&E can be conducted using a wide array of tools, methods, and approaches [3]. Key to M&E are KRAs and KPIs [4]. KRAs refers to those areas of a person's job that make the biggest impact on end results and KPIs are a quantifiable measure of performance over time for a specific objective [5].

However, in most Catholic institutions the leadership and management are insufficiently trained in M&E to provide good governance. Therefore, there is work need to equip the laity,

religious and clergy who are involved in the running of Catholic organizations with tools that would enable them work efficiently and effectively [6].

Literature Review

There are no adequate monitoring and evaluation instruments and systems in Catholic institutions in Lusaka [7]. There is a need for monitoring and vigilance in administrative, economic, and financial matters regarding crucial institutions, offices, and other institutions [8]. The Catholic Bishops in their Strategic Plan (2017-2026) also expressed concern that there were no monitoring and evaluation systems at different levels of the Church [9]. The Strategic Plan for St. Joseph’s Parish (2019 - 2023) in Lusaka also notes of the need to strengthen monitoring and evaluation systems, through among others, annual review meetings, midterm reviews, end line/summative evaluation, quarterly reports and devising feedback mechanisms [10]. As such, there is a need to continually monitor and regularly review performance [11]. All this indicates that there was a challenge in monitoring and evaluation mechanisms in Catholic institutions.

Methodology

The philosophy underpinning this study is pragmatism. A pragmatic methodology provides the researcher with the opportunity to utilize a wide range of strategies or multiple methods to answer a research question, as well as different forms of data collection and analysis techniques that are envisioned to ably meet the researcher’s needs and purposes to best understand the

research questions [12]. Thus, apart from data, method, investigator, and theoretical triangulations, this study was action research as well as a multiple case study of four (4) categories of Catholic institutions.

Sampling and Data Collection

The study was conducted in seven (7) Catholic institutions in Lusaka, and some parts of Central Province. The sample size was 257. There were 252 questionnaires which were administered purposively and randomly to respondents in the first line, middle and top leadership, and management positions, and 5 in-depth interviews were carried out on key informants purposively selected. Of the 252 questionnaires, 198 were answered and received back. This represents an overall response rate of 79% and a failure rate of 21%.

Data Analysis

The type of data analyzed was largely numeric information gathered on scales of instruments and text information recorded and reported during in-depth interviews [13]. Thus, Excel and thematic data analyses were used. Data analysis was determined by the research objectives and research questions. The presentation of data was done using tables because they are simpler to understand.

Results and Discussions of Findings

Monitoring and Evaluation Systems

Table 1 presents the views of respondents on the question: ‘Does your institution have a robust results-based M&E system?’

Table 1. Does your Institution have a Robust Results-based M&E System?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	64	25.4	47	47
	Yes	107	42.5	63	100.0
	No response	81	32.1	100.0	-
	Total	252	100.0	-	-

The survey shows that less than half (42.5%) of the respondents affirmed that there was a robust results-based M&E system in Catholic institutions. More than 50% of the respondents had a contrary view. Therefore, most Catholic institutions did not have a robust result-based M&E system.

Systems for Regular Monitoring Institutional Activities

Table 2 presents the observations of the respondents on the question: ‘Do you have a system for regular monitoring of institutional activities?’

Table 2. Do you have a System for Regular Monitoring of Institutional Activities?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	31	12.3	23	23
	Yes	103	40.9	77	100.0
	No response	118	46.8	-	-
	Total	252	100.0	-	-

The data in Table 2 shows that less than half (41%) of the respondents said that there was a system of regular monitoring in most Catholic institutions, while 59% had a contrary view. Moreover, all 5 Key informants (100%) said that monitoring and evaluation was irregular. Furthermore, all 5 key informants (100%) and 46.0% of respondents said that the common means of evaluation were meetings; either quarterly, mid or end of year. Therefore, there was no good governance in Catholic institutions since there was irregular and inadequate M&E systems and the only tools used were meetings.

Practical Implications

Performance management system is any approach for improving management effectiveness of an organization and of employees by means of standard-setting, appraisal, and evaluation [14]. Thus, without performance management in Catholic institutions, it would be very difficult to achieve organizational vision as there would be not benchmarks and targets to aspire for. The monitoring and evaluation process is essential for ensuring that programs and projects are achieving their intended goals and making a positive impact [15].

This means that Catholic institutions provide services in the areas of health, education, spiritual – pastoral and social welfare, but have no way of assessing and knowing whether the intended targets are being met or not.

KRAs and KPIs are very critical to M&E [16]. These are two essential measurable values that assist organizations in evaluating success and progress. Deficiency in KRAs and KPIs in Catholic institutions means that there is no way of measuring the success and progress of these organizations.

Stewardship is the management of whatever a person is entrusted with, not only to preserve but also profitably administer for his master, ultimately for God. Christ proposed the faithful steward as model for the responsible Christian (Lk 12:42, Mt 28: 18, Jn 19:11). For that reason, Catholic institutions should be managed diligently and responsibly.

Recommendations

To address the *essence of monitoring and evaluation systems for good governance of Catholic institutions in Zambia*, there is a need to:

1. Take a stewardship approach to management of Catholic institutions.

2. Build capacity of leaders and managers in the areas of performance management and monitoring and evaluation.
3. Put in place measures, which include KPAs and KPIs, to enhance monitoring and evaluation systems.
4. Use other means of monitoring and evaluations apart from meetings, such as theory of change, logical framework, monitoring and evaluation plan, statistics – open datasets, system data, surveys, interviews and focus groups, and sample size.

Conclusion

Building capacity of leaders and managers in the areas of performance management, enhancing monitoring and evaluation mechanisms, and embracing stewardship approach to management would address the challenges of poor governance in Catholic institutions.

Acknowledgement

The study was conducted in seven (7) Catholic institutions in Lusaka and parts of Central Province:

References

- [1] Zech, E. C. (Ed). (2010). Best Practices in Catholic Church Ministry Performance Management. New York: *Lexington Books*.
- [2] Buford, B. (2014). *Drucker & Me: What a Texas Entrepreneur Learned from the Father of Modern Management*. Tennessee: *Worthy Publishing*.
- [3] Independent Evaluation Group of the World Bank (2013 – 2023). Monitoring and Evaluation, <https://www.ieg.com/>
- [4] Suchal, B. (2023). Effective Methods of Performance Appraisal, <https://www.google.com/search?q=suchal+bojamma+2023>.

1. St. Mathias Mulumba Catholic, Bauleni Parish, 2) Bauleni Special Needs Project, 3) Immaculate Secondary School, Ibex, 4) St. Patrick's Secondary School, Kabwata, 5) St. Joseph's Mission Hospital, Nangoma, 6) Assumption of Our Lady, Roman Parish, and 7) Zambia Conference of Catholic Bishops' Secretariat, Kabulonga.
2. Therefore, many thanks are due to the heads of these institutions for the permission to conduct the study and for helping in administering the questionnaires. Appreciation also goes to the staff for the consent to take part in the survey. Gratitude is invaluable also to Mr. Chola Chifukushi, the research assistant who conducted the in-depth interviews.

Conflict of Interest

Though this was both action research as well as a multiple case study, the author has not declared any conflict of interests.

[5] Cole, A. G. (2004). *Management Theory and Practice* (6th Edition). London: *Book Power*.

[6] Zambia Conference of Catholic Bishops. (2022). ZCCB Pre-Synod Synthesis on the Synod on Synodality. Lusaka: Catholic Secretariat. See also Pope John Paul II. (1995). *The Church in Africa: Post-Synodal Apostolic Exhortation*. Nairobi: Paulines.

[7] Archdiocese of Lusaka Pastoral Office. (2012). *Archdiocese of Lusaka Pastoral Plan: 2012 - 2016*. Lusaka: Artperfect.

[8] Pope Francis (2022). *Preach the Gospel: Apostolic Constitution Praedicate Evangelium*. Nairobi: Paulines.

- [9] Zambia Conference of Catholic Bishops. (2016). *ZCCB Strategic Plan: 2017-2026*. Lusaka: Catholic Secretariat.
- [10] Chilenje Parish Team. (2019). *Strategic Plan for St. Joseph's Parish: 2019-2023*. Lusaka: Artperfect.
- [11] Lusaka Archdiocese Pastoral Office. (2023). *Lusaka Archdiocese Strategic Plan 2023 -2027*. Lusaka: *Sotrane Publishers*.
- [12] Feilzer, M. Y. (2010). Doing mixed methods research pragmatically: Implications for the rediscovery of pragmatism as a research paradigm. *Journal of Mixed Methods Research*, 4(1), 6–16. <https://doi.org/10.1177/1558689809349691>.
- [13] Creswell, J. W. (2009). *Research Design: Qualitative, Quantitative and Mixed Method Approaches*. London: Sage.
- [14] Cole, A. G. (2004). *Management Theory and Practice (6th Edition)*. London: *Book Power*.
- [15] Ibrahim O. (2002, October). Monitoring and Evaluation Division, <https://www.google.com/search?q=brahim+Osman.+Monitoring+and+Evaluation+Division.+October+2002>.
- [16] Suchal, B. (2023). *Effective Methods of Performance Appraisal*, <https://www.google.com/search?q=suchal+bojamma+2023>.