

Midterm Evaluation: Time to Adjust

E-book summary

Midterm Evaluation: Time to Adjust is a practical e-book that helps project teams, coordinators, monitoring and evaluation (M&E) staff, program directors, and consultants design a useful, honest midterm evaluation that leads to action.

The e-book is based on one central idea:

A final evaluation looks back to account for results. A midterm evaluation looks ahead to help the project adjust its direction.

The focus is more than producing a long report or meeting a donor requirement. The aim is to help readers pause halfway through a project, examine the evidence, and make decisions while there is still time to adjust.

1. The problem this e-book addresses

Many organizations reach the midpoint of a project without a clear understanding of whether they are on track, what is working, what is not, and what needs to change.

The problem is not always a lack of data. Often, the team:

- Confuses midterm evaluation with an audit, monitoring, or a final evaluation.
- Evaluates too late, when there is little time left to make changes.
- Asks weak questions that cannot be answered or do not support decisions.
- Copies evaluation criteria without adapting them to the project's stage.
- Collects data without a clear plan for using it.
- Produces findings that are difficult to justify or are based on opinions.
- Makes general recommendations that no one implements.
- Produces an attractive report that makes little difference to the second half of the project.

This e-book addresses that gap. It helps readers move from implementing a project without enough information to designing a midterm evaluation that produces evidence, findings, and specific decisions to adjust the project's direction.

2. What you will build

By the end of the process, readers will have a complete midterm evaluation, with questions, criteria, evidence, findings, recommendations, and an action plan ready to implement.

The main deliverables are:

Deliverable	Status
Initial evaluation assessment	☐ Complete
Evaluation questions and prioritized criteria	☐ Complete
Validated overarching evaluation question — Individual Session 1	☐ Complete
Evaluation Terms of Reference (ToR)	☐ Complete
Data collection plan and interview guide	☐ Complete

Deliverable	Status
Findings matrix with evidence and confidence levels	☐ Complete
Recommendations prioritized by impact and feasibility	☐ Complete
Reviewed and strengthened post-evaluation action plan — Individual Session 2	☐ Complete

The outcome goes beyond understanding how to conduct an evaluation. Readers will have developed an evaluation that supports real decisions in the second half of the project.

3. How IGROW guides the process

IGROW structures the entire e-book. It does more than organize the content: it helps readers examine, evaluate, make decisions, and adjust a project while there is still time.

IGROW stage	How it applies in this e-book
I — Intention / Issue	Clarifies why you are here and which difficult reality you need to face. The e-book starts with a key question: is your project really working as you think, or are you implementing it without enough evidence to know? This stage highlights the risk of moving forward without sufficient information.
G — Goal	Defines what to build at the end of each section. Each part produces a specific deliverable: evaluation questions, criteria, Terms of Reference, a data collection plan, a findings matrix, recommendations, or an action plan. Learning becomes practical work.
R — Reality	Examine the current situation and the weaknesses affecting your evaluation or project. Readers identify problems such as poor timing, weak questions, unsuitable criteria, data without analysis, unsupported findings, or recommendations that no one implements.
O — Options	Provides practical tools to address each gap, including frameworks, templates, criteria, methods, matrices, traffic-light ratings, and formats to improve evaluation, decision-making, and corrective action.
W — Way Forward	Ends each section with a clear next step. Each exercise informs the next: the assessment informs the questions, questions inform criteria, criteria inform the Terms of Reference, data informs findings, and findings inform the action plan. Every component is connected.

4. What this e-book promises

This e-book does not promise that the project is working perfectly. It starts with the opposite idea: a good midterm evaluation should be somewhat challenging, because its value lies in showing what needs to change.

It does promise that, by the end of the process, readers will have an evaluation designed to generate useful evidence and turn it into decisions they can act on.

In summary:

The e-book turns uncertainty at the project midpoint into a clear, honest evaluation focused on adjusting the project's direction, with strong questions, relevant criteria, well-supported findings, and a practical action plan.

This helps readers move from saying:

"We are halfway through the project, and we do not know whether we are on track."

To say:

“We know what is working, what is not, why this is happening, and what specific actions we will take to improve the second half of the project.”