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Introduction to Monitoring and Evaluation

CVS South Gloucestershire 2009

Introduction to Monitoring and Evaluation

1. Introduction

Monitoring and Evaluation can often seem an added burden that takes time away from direct work rather than a useful process that will help you in the day to day work. However it can be integrated into the work that you do and will help you:

- ⇒ Know the work you are doing is achieving what you are aiming for
- ⇒ To keep on track and show the successes of your work.
- ⇒ Understand what works well and where improvements are needed.
- ⇒ To be open, transparent and accountable to your funders and service users.
- ⇒ To show you value and recognise the work of staff and volunteers.
- ⇒ In the future planning of your work.

It is therefore important to develop a process that is integrated into the day-to-day work and is a process in which staff and users can see the purpose, and experience the benefits of monitoring and evaluating.

2. Monitoring

Monitoring helps you to watch and check carefully over a period of time in order to discover something. Pretty much anything can be monitored, therefore, before starting any monitoring it's worth asking the following questions:

- ⇒ What information is needed and why?
- ⇒ What outputs and outcomes do you anticipate?
- ⇒ What measures will you use to show you are achieving the anticipated outputs and outcomes?
- ⇒ What is the information for?
- ⇒ How often will you need to collect it to find out what you need?
- ⇒ How can the information be gathered and by whom?
- ⇒ How should it be collated and reported?
- ⇒ Who should see the report?

3. Evaluation

Is the process of looking at the information gathered and making an assessment of the quality of work. For it to be effective, evaluation requires:

- ⇒ Clear objectives as to what is being evaluated and how.
- ⇒ Sufficient information including feedback from service users.

⇒ Willingness to accept criticism about the organisation, its management or activities, by all participants.
⇒ A willingness to make changes if that is what is needed.

4. When should you monitor and evaluate your project?

This will depend upon what is being collected. Some monitoring information may be recorded daily, such as number of enquiries or numbers who use your project. Evaluation is often only done at the end of a project as a final process, when it is too late to correct any errors. It is therefore important that evaluation is an ongoing process to allow changes to be made during the life of a project to improve it and bring greater benefit. Evaluation forms can be used after each event and/or at regular intervals during the period of service delivery.

The evaluation should be well planned at the beginning of a project, carried out in a way that is repeatable and it should be efficient and relevant - answering the questions you want to know the answers to!

5. Who does the monitoring and evaluation?

Monitoring can be both done internally and or externally. Internal monitoring is generally cheaper and good for collection of routine data. External sources could be used for specific tasks or where an independent view is needed.

Internally a range of staff, volunteers and service users could be involved in collecting, collating, assessing and producing the results of your monitoring and evaluation. It does not have to be all produced in written forms – see the different methods below. However it is good to have someone who is responsible for co-ordinating the monitoring and evaluation process for each project.

Finally it should be enjoyable for those participating. The evaluation should not be an end in itself but a valuable opportunity to discuss the project in depth and a practical way of taking the project / group forward.

6. What to collect

Make sure that you:
⇒ Collect the information that is meaningful,
⇒ Provide evidence of the development, change or benefit (outcomes) that you planned to achieve through undertaking your project.
⇒ The information you collect enables learning for stakeholders so encouraging a “learning and developing” culture in the partner organisations.

The sorts of information that will be useful could include:

i) **Data/ Statistics** – these are often the easiest to collect, which can sometimes lead to an overload in data collection. Therefore, carefully consider what is really needed and useful. You can collect data and statistics on:
Inputs: The resources you put into a project or activity can be easily monitored, such as staff time, volunteers' time, funding and any other provision you use to take a project forward. For example, you might want to check how much time your staff spend on a particular activity and then assess this against your expectations.

Outputs: These include the numbers of activities you may undertake and attendance that happens that indicates your service or project a success. e.g. 5 training courses with total of 50 people trained; 4 newsletters distributed to 400 groups/ individuals etc. They can show how close to your original targets you were.

ii) **Factual information** – simple information can be collected such as; what activities have been undertaken or level of advice given

iii) **Qualitative information** – views, feelings and experiences of those involved, in the work or affected by the project will provide strong evidence for the success and impact of the project

iv) **Visual information** – pictures and film for example can provide very good evidence that you have achieved your aims.

When deciding on what and how to monitor and evaluate consider whether it is:

1. Appropriate, accessible, inclusive and enabling honest meaningful reflection on experiences.
2. Undertaken in a non-judgemental environment where it is safe to be critical.
3. Objective as possible.
4. Enabling the reflection and learning that relates to why you are evaluating and benefits the stakeholders of the project (e.g. staff, children and young people).
5. Providing information that can be analysed and generate concrete evidence.
6. Adding to the empowerment of users and not using them.
7. Building on the strengths of those delivering the services.

7. Methods and what to consider

Simple methods:
Observation – this is good for assessing some of the 'soft' outputs such as growth in confidence. However, it will reflect a subjective opinion, which may need to be considered when interpreting findings.

Interviews - can be used to gain a variety of information. Careful planning is needed to ensure the questions asked give the information wanted.

Evaluation forms – a good way of getting immediate or follow-up feedback from an event or a training session.

Evaluation Method	Considerations
FOR ALL METHODS	❑ Who will be involved? ❑ What reflection is meaningful and useful? ❑ What information do you need and why? ❑ Are you asking the right questions to get the information that you need? ❑ How will you do it with people? ❑ What information should be confidential? ❑ How will you collate and analyse and who? ❑ What time do you have available? ❑ At what time intervals do you need to undertake the process? ❑ How will the information be used?
Written questionnaires (open and closed questions)	Additional considerations: ❑ How will the questionnaires be administered, and what support will be available for filling them in? ❑ What level of literacy do the participants have? ❑ How will the information be used? ❑ Questionnaires need to be carefully constructed so that they are objective and not leading ❑ When do you use and open or closed question?
Interviews – structured, non-structured	Additional considerations: ❑ Interviews can be more time consuming however they enable more depth of

	exploration. ❑ Interviews can also be done in a short and simple way. 3 simple questions can be more effective and accessible than 10 questions.
Assessment forms	Additional considerations: More appropriate where structured, more formal learning environment has taken place
Film/ video recording events and/or views of children and young people. Photos Drama Games Drawings/ pictures/ art	Additional considerations: These methods are often a more accessible way for children and young people to participate in the evaluation process. The method of analysis needs to be considered, as with these forms of evaluation they can be hard to interpret in the way that is intended if there is no verbal record to go with the process. Just photographs and or pictures do not clearly say anything, you need to be clear what the photograph is of and what it is indicating as photos can be easily mis-interpreted
Immediate feedback end of each session/ workshop/ event	Additional considerations: Identify capacity to collate and use information from every session needs to be
Focus groups	Additional considerations: How will you form the focus groups? Does the make-up of the focus group need to reflect the users you deliver services to?

Letter of support	Additional considerations: Letters of support need to have clear information that is specific and relevant. Letters can often be vague and full of generalisations with limited explanation. It is best to give some specific questions for the organisation to answer in the letter of support
Staff work plans, and reports - these can be used to monitor activity of workers or the use of a service; what's being done and when.	Additional considerations: Reporting framework should link with objectives and outcomes of the project. It could include quantitative and qualitative information. The type and amount of information needs to be agreed as reports can often become lengthy with information that will not be used.
Journals - diaries - staff comment book	Additional considerations: Journals could be used by those who wrote them to help them reflect back on what they have done and how they have developed over the period of time. They would detail more qualitative information.
Review action plans	Additional considerations: Consider how frequently this appropriate to do. Usually they are best done at 6 months to a year intervals. They may be done by the partnership group, by individual organisations in staff teams or individual workers responsible for areas of work. It could be helpful to have a facilitator, or someone outside of the project to assist with questions.
Peer interviews	Additional considerations: Need to consider level of trust, openness and objectivity between peers.

Peer support groups	Additional considerations: Need to consider level of trust, openness and objectivity between peers. How will information be recorded?

8. Analyse of information collected.

Analysis is about making sense of the data you collected. You should remain true to the data but should also look back at your initial information needs and base your analysis on this. You might end up not using all the data you collected. This is normal and it helps to make sure you are only reporting on the things you really want to know about and can use. Using a computer spreadsheet such as MS Excel can help you process the data. When planning a budget for the work, allow time to input and manipulate the data.

When analysing factual, qualitative or visual information it is useful to summarise and then outline conclusions that can be drawn out. Relate it to the original aims and outcomes that you had planned to achieve and make sure that your conclusions are reasonable based on the information collected.

9. What information should the evaluation report include?

The evaluation should include information such as:

⇒ How the evaluation was undertaken and by whom.
⇒ How service users were involved.
⇒ Background information to the project including its inputs.
⇒ Project aims and objectives; anticipated outputs and outcomes.
⇒ What information was collected and how.
⇒ How information was analysed and what it shows.
⇒ What else was achieved – any unexpected outputs and outcomes.
⇒ Baseline data to compare results against
⇒ Any lessons learned.

Make sure you monitoring and evaluation process is a realistic process and achievable with resources available

For further information:
Charities Evaluation Website: www.ces-vol.org.uk
They have excellent downloadable resources that provide a step by step approach to planning your monitoring and evaluation process.

Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss incurred as a result of any person acting on or refraining from acting upon it.