Understanding Monitoring & Evaluation

What is Monitoring and Evaluation?

If you're looking for funds (whether it is to fix the church roof, set up a youth club, or start a toddler group), you've already done some monitoring and evaluation, although you may not have known it!
Monitoring - you ***collected some data*** (talking to people, looking around, reading stories in the paper)
Evaluation – based on what you noted from the data, you ***decided*** the situation needs changing.

Monitoring (collecting data) and **evaluation (making judgements)** is critical to successful projects and to securing funding. Without the initial process just described, you cannot show funders that the project is needed and you cannot design the project. Once the project is running, collecting data and making judgements on whether you are succeeding, allows you to adjust what you are doing. Once the project is complete, or when you need further funding, collecting data and evaluating what has changed demonstrates to the funder that you succeeded.

Monitoring
Collect information:
- Before the project - on the situation now
- During and after the project on - what you did (on your activities (outputs) and the changes you brought about (outcomes))

You will instinctively be collecting data, but you need to take time and planning to collect information in an organised and routine manner. Good monitoring data provides you with a sound basis for judgements (evaluation) and information to give to funders.

Evaluation
Analyse the data and make judgements:
- Before the project to demonstrate the need for the project
- During and after the project to judge your success and the impact you had.
- Identify what you have learnt, particularly what works and what doesn't
- Share your findings with others, so others can replicate your success or avoid the same pitfalls
- Celebrate your success
- Judgements can be negative – you need to be open and honest in the evaluation process

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How to Undertake Monitoring & Evaluation

Monitoring

- Decide **what t**o collect
  - only collect data you can use – don't collect too much data just for the sake of it.
  - collect quantitative data (count the number of things/people, etc) and qualitative data (people's views, experience, and observable behaviour)
- Decide **when** to collect
  - at the start of the project (baseline data) so you can demonstrate you have made a difference
  - through the project
  - at end of project to add to regular monitoring data to show what difference you have made
  - after the end of project – to see what has happened to clients over a longer period
- Determine **how** you will collect data
  - Collecting data on **outputs** (eg did your project do) includes:

    Register of attendees
    Details of attendees – age, gender, postcode, disability
    Record of how many sessions
    Minutes of meetings
    Staff training records

    If it is difficult to collect data about clients (eg at a drop-in centre or using a helpline) then do a "snapshot" survey at set intervals. Use sampling if you have lots of clients/ activities.
  - Collect data on **outcomes** (what changes your activities are making) includes

    Questionnaires
    Feedback forms
    Log-book of observations - (staff watch how client's (eg children) behave and make notes - can be more accurate than recording how clients think they behave)
    Workshops
    Interviews (covering a series of questions or topics – a good way of looking at difficult issues, particularly with people who are unable to write things down – can use pictures and images to encourage people to participate)
    Surveys
    Photos
    Diaries
    Video

    You usually need staff & clients' opinions & feelings, observations of client's behaviour, but may also include opinions of the wider community or of other bodies such as schools
  - Look for ways that allow people to describe the impacts in their own way, using their own words
  - Collect data in a form that is going to be easy to analyse and evaluate
  - You can involve your clients in designing ways of collecting information

- Make your data collection system part of how the project functions and keep it simple

Evaluation

- Answer the following questions:
  - Did activities happen as planned? If not, why not?
  - What worked well and what didn't? Did you reach your target group?
  - Did the project make the changes hoped for? If not, why not?
  - What else have you learnt ?
- Use monitoring data and external data sources (eg national/local statistics)
- Do it yourself (self-evaluation) or employ an outsider
- Decide who else would be interested in the results – funders, users, trustees, staff, local authority?
- Decide how to report the information most appropriately
  - annual report
  - conferences or meetings
  - newspaper articles or radio interviews
  - website
  - newsletters.

Useful Sources of Information

- Charities Evaluation Service, www.ces-vol.org.uk particularly "First Steps in Monitoring and Evaluation" available on website
- Big Lottery website, www.biglotteryfund.org.uk particularly "Explaining the difference your project makes" and factsheet "Using Questionnaires and Surveys"
- Joseph Rowntree Foundation, www.jrf.org.uk particularly "Evaluating community projects – a practical guide"