Resource Centre

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Monitoring and evaluation

Information to help your community group think about what you are aiming to achieve, how to find out if you are succeeding, and how to demonstrate to the outside world that what you are doing is useful.

Most people involved in running a group, and certainly all of those who have applied for a grant, will have heard the phrase 'monitoring and evaluation'. It isn't always clear, though, exactly what it means. Seen on an application form, or when compiling a report on how money has been spent, it can sometimes seem like a bureaucratic hoop that you need to go through. Used properly, though, monitoring and evaluation can be a very useful tool and, stripped of the jargon, it isn't too complicated:

- **Monitoring** is collecting and recording information about what your group is doing
- **Evaluating** is using the information you have collected, together with other information and your overall experience, to get a good clear picture of your group and its work.

Looked at like this almost every group does monitor and evaluate what they do, if only informally: counting how many people turn up at a meeting is monitoring, and chatting about how an event went for a few minutes at the end is evaluation.

This information sheet aims to help when you need to do something more systematic than that. It aims to help you think about your work and its effects more clearly, and to do so in a more formal way that lets you demonstrate to the outside world, such as funders, that what you are doing is useful.

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Why monitor and evaluate your activities?

There are two good reasons why you might want to make your monitoring and evaluation more structured. The first, and most important, reason is that it helps you judge how effective your efforts are and what you could do to make them more effective. The second reason, and the one which prompts most groups to look at monitoring seriously, is that people who give out funds increasingly expect it.

In particular, monitoring and evaluating can help you

- check that what you are doing is actually having the effect you want
- improve your work by identifying things that aren't working
- change what you are doing if the situation changes
- provide evidence for funders or potential funders that what you are doing is working

All of these are useful but only if the monitoring doesn't take so much time that you can't get on with your other work. This is why the first step in any monitoring and evaluation should be planning it.

Planning your monitoring and evaluation

Every organisation will have a different way of monitoring and evaluating their work. What it is useful to do depends on what that work is. However there are two principles that are worth all groups bearing in mind when planning monitoring and evaluation.

Two principles…..

- Involve several people in deciding what you are going to do, and working out how you are going to do it. The aim is to provide useful information to your group, *not* to build up reams of paperwork. You will only design something useful if you have ideas from a number of people. Also, you are going to be reliant on people to collect the information, and this will only happen effectively if they understand why they are doing it.
- Keep it as simple as possible. You don't want to take on too much, especially if you are only just starting to monitor your work. You can always get more detailed later, if you need to.

…..and some questions

The aim of monitoring is to provide the basis for your evaluation, and so when planning it is best to start with thinking about the evaluation. You will need to ask yourself

- What are the main things we want to evaluate? These should be the central things your group or project is trying to achieve.
- What information will help us to evaluate these?
- Who is going to record this information, and how?

The first of these is the key question, and you need to be as clear as possible about answering it. For many groups there is a problem in writing down clearly what they are trying to achieve. They often have, on one hand, a very general aim in their constitution and, on the other, a series of quite specific things they are doing. What they are trying to achieve lies somewhere in between.

> For example, a pre-school's constitution may give its aim as being 'to enhance the development and education of children primarily under statutory school age'. Their activity may be to run an pre-school with 20 places between 9.30 and 12.15 every weekday. Providing places is obviously pointless if no one takes them up, so part of their aim will clearly be to fill places. They may also have decided that they want to ensure that some of the places are available for children of families who are unable to pay the full fee, and so offer reduced rates for children where the family is on tax credit.
>
> All of this may translate into an aim of 'providing 20 places between 9.30 and 12.15 every weekday, with a take up of at least 90% over the course of a year. A minimum of 25% of all children to come from families in receipt of tax credit.' It is possible to monitor this – by counting the children, and keeping figures on those paying reduced rate – and to evaluate it by checking whether the targets set have been achieved.

Being clear about exactly what you hope to achieve from what you are doing is the most important part of planning your monitoring and evaluation. If you don't get this right then everything else will inevitably be muddled. Ask yourself

- Do we have a clear statement of what we are trying to do?
- Does it contain clear targets which are measurable?
- Does it spell out what we will regard as a success?

How to do it – monitoring

There are various methods for collecting the information you need. Which you choose will depend on what you are trying to monitor. However you collect information, you should:

- be consistent: your data will only be useful if you have collected it systematically
- keep it simple: your volunteers or employees need to be able to collect the information without it taking over the main activities
- make sure it relates to the aims you have agreed, and is useful in measuring whether you are achieving them. Never collect data without knowing why you need it.

There are two main kinds of information to collect:

- Information about what you are doing, e.g. number of sessions held. (Funders call this "outputs".)
- Information about the effect your work is having, e.g. improvement in people's health. (Funders call this "outcomes".)

Outputs

Recording outputs mainly means counting things. How many people have attended your group? How many sessions did you run? Were the people who came mainly women or men? From a particular ethnic community? From the area or outside? From a certain age group? Employed or unemployed?

Only collect data you actually need to help check you are meeting your aims. For example, if you are aiming to run activities for children from low income families, you will need to find out how many children from low income families are attending. Be clear with people why you are asking them questions, and store the data securely.

Whatever data you gather, make sure you record it consistently so that you can compare it over time.

Outcomes

Collecting information about the effect you are having (the 'outcomes' of your work) can be more complicated. You need to try and find out what people are thinking and the effect that you are having on their lives. There is a range of things you could do to collect this information:

Feedback from users

Getting the ideas of users about how things are going is a first step. You might want to use a comments book or suggestions box; give users evaluation forms at the end of sessions; produce a questionnaire for everybody who comes in a particular week. You might also find it useful to record informal comments from users.

Feedback from workers

Whether they are volunteers or paid staff it is useful to get the ideas of people who are actually doing the work. If it is a one-off event then try and get people together at the end, if only for a few minutes, to talk about what went right and what went wrong. If you have staff then make it a regular item in staff meetings to talk about how things are going.

Before and after

To show that your work has had an impact on people's lives, it is useful to gather information how things have changed for participants. For example, if you provide training to people who are unemployed, you could contact them a few months later to find out if they are now employed. If you run a yoga class which aims to improve mental and physical health, you could use a questionnaire to ask people how they feel before they start the course, and after six-months of attending. New Economics

Foundation have published a very useful guide to measuring wellbeing[1], which will help you think about the kinds of questions to ask to get an understanding of how people are feeling overall, and how your work is impacting their lives.

In practice if you spend too much time monitoring you never get any work done (and your users get sick of answering your questions!) It is important to get a balance. If you have a large number of participants, you could ask more in-depth questions to just a sample (e.g. a randomly selected 10%).

The Big Lottery Fund has some useful information on their website about the kind of records they expect groups they fund to keep, and how to set and measure aims and outcomes[2].

The Community University Partnership Project can help with more complicated research needs in Brighton & Hove[3]. They provide training, a help-line, one-to-one guidance and matching to research specialists in the University.

The Monitoring, Evaluation and Impact Partnership have useful resources about planning and conducting effective monitoring work[4].

How to do it – evaluating

Once you've collected your information you need to work out what it is telling you. Are you achieving the aims you set out to achieve? Your exact process for evaluating your work will vary from one organisation to another, but there are some basic principles to keep in mind:

- Accept that this can be quite a long process and needs a reasonable amount of time.
- Remember to refer to the aims you agreed before your started. Does the information you collected suggest you are achieving your aims? Has your monitoring given you any new information that might help you set new aims for the future?
- Include your workers, volunteers and members. Your aim is to get a clear picture of what you are doing well, what you could improve, and whether you are achieving your goals. The more viewpoints the better.
- Make sure you draw on all the sources of information you have. Just because you have some new statistics don't ignore the experience of people in the organisation. Put what you have learnt into the context of what you already know.
- Recognise that people in the group have invested time and effort into making things happen. If your monitoring is showing that an event didn't have the effect you hoped then be aware that this is the responsibility of the whole group, not just the people who were most closely involved.

[1] http://www.uknswp.org/wp-content/uploads/Measuring_well-being_handbook_FINAL.pdf

[2] https://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/aims-and-outcomes

[3] https://www.brighton.ac.uk/business-services/community-partnerships/index.aspx

[4] http://blogs.brighton.ac.uk/meicommunity/mei-partnership/

Using the information

Having put this effort into collecting information, and working out what it means, get the most benefit you can from it.

Where you find you have done a good job then let people know. Tell your users and your funders that you are successfully achieving your aims, and have the facts to prove it. Think of ways you could publicise your good news. Perhaps an article in your newsletter, or some details in your annual report? You might even want to press release the results if they reflect particularly well on your work. See our information on *Reporting to a funder* for tips on illustrating your success to a funder.

Where you find things haven't gone so well, consider ways you could improve your work to increase your likelihood of achieving your aims. You could use the evidence you have collected to make a case to funders that they should give you a grant for a new and improved activity. See our sheet on *Planning a funding application* for tips on planning a project and getting funding for it.