Resource Centre

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Monitoring and evaluation

Information to help your community group think about how well you are achieving your aims, and how to demonstrate to others 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'. This information sheet explains what monitoring and evaluating are, why they are useful for community groups, and how to do them.

Contents

What are monitoring and evaluating?

- **Monitoring** is collecting and recording information about what your group is doing
- **Evaluating** is using this information to assess whether your group is doing a good job

Almost every group will be doing some kind of monitoring and evaluation, at least informally, even if you don't realise that's what you're doing. For example, counting the number of people who came to a meeting is monitoring; and having a chat at the end of an event about how the event went is evaluating.

Brighton & Hove City Council

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Why monitor and evaluate your activities?

There are two good reasons why you might want to monitor and evaluate your group's work. The first, and most important, reason is that it helps you judge how well your group's activities are working, if they are achieving what you would like them to achieve, and what you could do to make them better.

The second reason is that most funders expect groups to have a formal system to monitor and evaluate their work. They usually require you to send them a monitoring/evaluation report at the end of your funding period to show them what your group has achieved with the money they gave you.

Both 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 to plan it carefully.

Planning your monitoring and evaluation

There are lots of different ways that your group might choose to monitor and evaluate your work. What will be useful for you will depend on what your aims and activities are. For all groups, though, there are three principles that will be useful to stick to:

Principles for planning

- Involve several people in deciding what you are going to do. The aim is to provide useful information to your group, *not* to build up reams of paperwork. You are more likely to design something useful if you have ideas from a number of people. You are also going to be reliant on lots of people in your group to collect the information, and this will happen more effectively if everyone understands 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.
- Start by thinking about what you will want to evaluate, then work out what information you will need to monitor.

Questions to guide your planning

Your group should ask itself:

- 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?
- How are we going to record this information, and who is going to do it?

The first of these is the key question, and you need to be as clear as possible about answering it. For many groups, it is difficult to write down clearly what you are trying to achieve. You might have a very general aim in your constitution and then a set of specific things you are doing. What you are trying to achieve lies somewhere in between.

> For example, a pre-school's constitution may describe its aim as being "to enhance the development and education of children under five". Their activity may be to run a pre-school with 20 places every weekday morning. Running the pre-school is obviously pointless if no-one comes, so part of what the group is trying to achieve is to have children come along. They may also want some of the places to go to children from low-income families, and offer reduced rates for children whose families receive child tax credits.
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> All of this may translate into an aim of 'providing 20 places between 9.30 and 12.15 every weekday, with at least 90% of places being filled 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 describe clearly 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. With any method of collecting 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 make sure your data collection and storage is in line with the relevant legislation (see our information on *Data Protection for Community Groups*). .

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 people who use your service or activity

Recording what your service users (or the people who are doing your activity) say 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 feedback frompeople 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 Monitoring, Evaluation and Impact Partnership have useful resources about planning and conducting effective monitoring work[2].

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 you 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, be aware that this is the responsibility of the whole group, not just the people who were most closely involved.

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, 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

[1] https://neweconomics.org/2012/07/measuring-wellbeing

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

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.