



Quick guide to monitoring and evaluation

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Introduction

If you are new to monitoring, measuring and evaluating this provides a quick summary of key principles and actions. For more detailed guidance to planning and delivering evaluation see the materials in the [Resources list](#) at the end of this document. You may also be interested in Food Power's [Guide to mapping and measuring](#) food poverty.

The value of monitoring, measuring and evaluating

Measuring and evaluating generate powerful information, so are worth doing well. There are 3 big reasons to devote time and effort to this activity:

1. It helps you understand what you have achieved and how – that means you can keep on doing what works, and celebrate your successes.
2. It helps you understand what hasn't gone as expected – then you can change things which aren't working.
3. It provides evidence of your impact and benefits to help convince others - funders, commissioners, policy makers - that what you do is important.

Funders and major grant programmes expect an element of evaluation so it is worth becoming skilled in delivering it, or knowing what to ask of others who can do it for you.

Remember – it is much easier to deliver effective evaluation if you plan it from the outset. Consider data collection as a key aspect of a project or initiative and design it into your delivery.

Key terms

This is some of the key terminology commonly used in relation to monitoring and evaluation.

Baseline: The situation before your activity or programme started, measured so you can track change over the course of delivery, e.g. number of households in food insecurity in a community began at 20% (baseline) and changed to 15%.

Case Study: An example or small sample of an activity or group which is used to give insight to the general situation, e.g. a person who has benefited from a programme whose story has things in common with other beneficiaries.

Data: Information you collect or access to answer a particular question. It can include stories (qualitative) and numbers (quantitative) material.



Evaluation: Collecting and using data to answer questions about the quality, value and direction of your activity or organisation. It might consider impact (what has been achieved) and process (how it was achieved). It usually covers [outcomes](#) as well as [outputs](#).

Monitoring: Routine collection and recording of data used to regularly check progress against plans. It focuses mostly on [outputs](#), probably using indicators designed to mark progress over a particular time period, e.g. tracking figures for volunteer hours every month.

Outcome: The changes, happening as a result of a project or activity, including learning and benefits, e.g. people are enabled to re-enter employment. Medium to long-term outcomes or changes beyond immediate beneficiaries might be described as impacts.

Output: Activities, services and products provided or delivered by an organisation or project, e.g. number of training sessions run.

NB: it is usually harder to measure and evaluate outcomes which means projects focus on outputs or what they did. But if you really want to understand the changes you are achieving then you should consider outcomes too – the impact the activity had.

Theory of Change: The model of how a programme or activity expects to deliver change, also called a *Logic Model*. It presents what you plan to do and how it will make a difference, indicating chains of cause and effect. Developing this can clarify the logic of a planned project, and provides a framework to build evaluation around.

Planning monitoring

Some funders will give guidelines on how they want you to monitor activity. Remember, this usually focuses on outputs – what you have been doing. Setting up a monitoring system is quite straightforward, just consider:

- What activity do we need to track? E.g. people involved, sessions organised, services provided.
- How regularly? E.g. weekly, monthly, annually.
- What indicator can you use? E.g. number of people at each session, hours of service provision per week.
- How can you collect the information? E.g. attendance records, monthly questionnaire to staff.

If you have set targets or ambitions these can be linked to monitoring so you are aware of how you're progressing. For example, if you need to engage 20 volunteers by the end of the second year, you might check every 6 months how many you have recruited.

NB: How much detail do you need? For example, do you need to know not just how many people you have supported, but some details about them such as gender, ethnicity or age.

Try to build monitoring into your regular processes so it is not additional work, but part of the routine.



Planning evaluation

Some funders will give guidelines on how they want you to evaluate funded activity. To make the process valuable to you it is still worth considering the following.

a) What do you need to know?

Determine the aims of your evaluation - what questions do you need to answer. These might include:

- What difference did this project make, to who and why?
- What worked well, for whom, in what circumstances, at what time and why?
- Did anything happen that wasn't expected to happen?
- Is the project on track to meet its desired outcomes? Is the project demonstrating value for money?

Knowing the specific changes you hope to achieve will help to answer these questions so it will help to have a [Theory of Change](#) and/or set of intended outcomes.

Outcomes might include things like new experiences or learning for beneficiaries, in which case some of your data collection will need to explore how they are experiencing the project, and how they feel about it.

Food Power has a set of overarching outcomes and evaluation aims, some of which can apply at the local level too. Aligning with these will help gather information demonstrating the cumulative impact of activity across all the local alliances, and through national coordination.

b) How can you answer these questions?

Next you need to identify the data which will help you answer the questions, and how it will be collected. Don't forget this can include numbers *and* stories. Ways of collecting the information could include:

- Survey/ questionnaire
- Interviews
- Focus groups
- Workshop methods / discussion activities.

For advice on selecting appropriate methods see [here](#). For a range of interactive tools for exploring issues with groups try [Leapfrog Tools](#).

Here's an example from the Food Power Evaluation Plan which shows one way to organise the plan:



Table 1: Organising an Evaluation Plan

Outcome	Measure	Data Required	Data Collection Method	Delivery
Local alliances are able to apply learning from other projects or initiatives from across the UK to enhance their own ability to reduce household food insecurity locally	Number of Local alliance partners made aware of other relevant projects around the UK (100%)	Number of downloads, website views, newsletter recipients and webinars attendees Qualitative feedback from users	Google Analytics, webinar software Survey of all alliances Interviews with selection of case study alliances	Food Power staff, annually External evaluation, annually

c) Who should be involved?

Good monitoring and evaluation requires dedicated resources, mostly people’s time to collect and work with the information. It can also be helpful to involve a range of stakeholders including beneficiaries in deciding your approach and delivering it. You certainly need to be clear who is responsible for delivering each type of data collection, and examining the results.

Consider whose perspectives you should seek. Staff, volunteers and beneficiaries are all likely to have different ideas about a project’s success. Using a mix of data sources allows you to hear about these. For example, you might ask volunteers to complete a feedback survey, then run a discussion group with beneficiaries.

d) How to share the results?

Once you have collected the data it needs to be analysed to understand what it is telling you, what it shows. Again, this could include stories and numbers. A good way to start is to consider whether the outcomes have been met, or how far they have been progressed.

The key findings can be reported to funders, beneficiaries, partners and the public. Reporting will focus on answering the questions you decided on in step 1. As well as describing the impact you have had and what was achieved, share what has been learnt – including what didn’t go so well.

You don’t have to rely on written reports – there are various [creative formats](#) to consider.



The results of evaluation are not just for external audiences. Reflect on them to consider what is working or not working, and what might be changed. And don't leave this until after a project ends – a midway evaluation report and reflection can inform the latter stages of delivery.

- **Plan monitoring and evaluation from the start.** It is a core aspect of a project or programme so should be planned as such, including allocating suitable resources. It is also much easier to ensure you can gather all the most useful data if you think about it early on, and embed data collection in the regular activities you will be delivering. This is particularly important for baseline information.
- **Work with different types of data.** Stories, numbers, images and video are powerful in different ways, and capture different dimensions of impact. Each can influence certain people so it is a good idea to seek a mixture of types of data.
- **Be honest.** If things haven't gone as expected or worked out so well then say so! This will help you and others make changes to be more successful in future.
- **Be credible.** Think about what you can realistically claim as your impact. Some changes may be observed but not closely related to what you have delivered. When you collect data it can be helpful to ask beneficiaries and stakeholders about attribution – who or what do they see as having made a difference.
- **Learn from the results.** Reflect on what the evaluation tells you, and use this to inform your plans or activity. Think of it as a cycle: act – reflect – act. You can do this part way through a project as well as at the end.

Resources list

[Big Lottery Fund Guide to Evaluation](#)

[Joseph Rowntree Foundation guide to evaluating community projects](#)

[NCVO guide to monitoring and evaluation](#)

[NCVO guide to building a theory of change](#)

[Better Evaluation website](#)

[Cardiff University guide to qualitative evaluation tools](#)



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