Monitoring and Evaluating Your Project

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Monitoring and evaluation are different but similar activities, both of which help you to see how well your project is proceeding or what impact it is having on its intended audience. Monitoring and evaluation not only measure how well you are doing against your aims and objectives, but also give you the information you need to help you to be more effective. In this guide, Learning Resource Co-ordinator Alison explains the two concepts, and gives you the lowdown on how to monitor and evaluate your work.

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1. First steps

- Be clear about your project's aims and objectives: they form the basis for both monitoring and evaluation
- Think about monitoring and evaluation from the very start of your project in order to ensure that you start keeping records of the relevant information
- Identify your project's *inputs* and *outputs* and desired *outcomes*: see below
- Simple is good! There is no need for complicated systems as long as you are collecting the key information.

2. What is monitoring?

Monitoring is collecting information that will help you answer questions about your project. It is important to collect this information an organised way. You can use this information to report on your project to funders or show others what you are achieving. The information can also help you to *evaluate* your project at a later stage.

The nature of the information that you need to record or monitor will depend on the nature of your project. The information might be about the activities you are running or about the people getting involved in your work. It may also be important to record the number of enquiries and approaches made about your project.

For example, you may be organising a series of events, in which case keeping a record of the date, location and the number of people who attend will be a basic minimum of information. You may also wish to record some information about the people who attend: e.g. their age, gender and ethnicity. In this case, you will need to create a monitoring form prior to each event. Here is an example of a monitoring form.

Some basic questions to ask about monitoring
- What are the key things you need to monitor in order to see if your project is achieving its aims and objectives?
- How often do you need to monitor it?
- Does the information you are collecting tell you what you need to know?
- Do you need to present preliminary results to ensure continued funding? If so, what information does the funder require?

3. What is evaluation?

Evaluation involves using monitoring data and other information to make judgments about how well a project is doing against its aims and objectives.

An evaluation can help you to assess where changes are needed, and how and where to improve performance. It can provide you with the information you need to apply for further funding, by demonstrating the benefits of your project. It can also, sometimes, give you feedback that you are not too keen to hear!

Evaluation can be done externally or internally. An external evaluation can be more objective but will cost money to pay someone to carry it out. Any evaluation ideally needs to involve everyone engaged in the project, in order that no one feels that they are being judged or assessed.

Most good evaluations involve the collection of both *quantitative* and *qualitative* information:

- *Quantitative* data is based on information about your project that you can count or measure (e.g. numbers of people attending events and activities taking place).
- *Qualitative* information is more personal information and less easy to measure (perhaps about personal opinions and feelings); it is often best collected through interviews, simple questionnaires or group discussions.

4. Other Key terms

Inputs

These are the resources put into a project in order to carry out an activity. Inputs may be human, material, financial or expressed as time. It may be important to record these if you are thinking of making further funding bids, but not necessary if you are simply monitoring the success of your project.

Outputs

These are the activities, services and products provided by a project or organisation: what they have 'put out' into the world. Outputs may include: events you are running, a website or book that you are producing, or a series of performances. These are usually quite easy to monitor or record.

Outcomes or impact

These are the changes and effects that happen as a result of a project's activities, e.g. increased confidence levels, skills gained, changed attitudes. Some outcomes are easier to measure than others; some will rely on people sharing their experiences and giving their opinions, perhaps via focus groups, interviews or questionnaires.

5. Monitoring and evaluation tips

- Keep it simple – think about what you need to monitor to show that your project is working. Focus on a few key aspects so you can get results without it becoming complex and demanding.
- Ensure it's relevant – think about whether those aspects you have chosen to monitor will give you with the information you need to make decisions.
- Remember to design monitoring into your project from the start. Are there people you can ask to take on this role as part of their contribution to your project?
- Promote the results – everyone likes a good news story. Local media are often interested in projects, especially those that involve the community. Bulletin boards and newsletters are also good ways of promoting your project to others who may be interested.
- Ensure sustainability – remember to plan for the long term. How will your monitoring and evaluation help you to apply for further funding.
- Check what is required from your funders.

6. Data Protection

It is important to be familiar with the Data Protection Act. Make sure data is used for its intended purpose. If personal information is kept about individual people, make sure that they know exactly what the evaluation is for, what information you have on them, that they can have access to it to check its accuracy, and that the project will preserve their confidentiality.

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Data protection principles

1. Personal data shall be processed fairly and lawfully and, in particular, shall not be processed unless – (a) at least one of the conditions in Schedule 2 is met, and (b) in the case of sensitive personal data, at least one of the conditions in Schedule 3 is also met.

2. Personal data shall be obtained only for one or more specified and lawful purposes, and shall not be further processed in any manner incompatible with that purpose or those purposes.

3. Personal data shall be adequate, relevant and not excessive in relation to the purpose or purposes for which they are processed.

4. Personal data shall be accurate and, where necessary, kept up to date.

5. Personal data processed for any purpose or purposes shall not be kept for longer than is necessary for that purpose or those purposes.

6. Personal data shall be processed in accordance with the rights of data subjects under this Act.

7. Appropriate technical and organisational measures shall be taken against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data.

8. Personal data shall not be transferred to a country or territory outside the European Economic Area unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects in relation to the processing of personal data. More information

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7. More resources on monitoring and evaluation

Visit The Evaluation Trust website or write to: PO Box 2954,Bristol BS6 9FS

Charities Evaluation Services offer training, consultancy, external evaluations and free information to help you strengthen the quality of your work and achieve better outcomes. They provide online resources on monitoring and evaluation.

Visit the Open Up forum to share your ideas and experiences of monitoring and evaluation.