Fact Sheet 18 – Monitoring & Evaluation

Monitoring and evaluation is an essential part of managing performance, particularly in determining how well you are doing and if you are meeting your aims or outcomes. It is also an important part of your service or project delivery, for example by demonstrating to funders that you have been successful, or by helping to secure further funding and contracts.

It is therefore important to document key information relating to your evaluation process, such as the timescale for evaluation, key performance indicators for a contracted service, or how you will monitor and report on the progress against the targets of a contracted service. Most importantly, monitoring and evaluation helps to ensure that service users continue to receive a high quality service from your organisation.

Monitoring

Monitoring involves keeping track of ongoing progress during an activity and being able to monitor allows you to identify any potential problems and take the required action early. It is useful to identify key criteria to monitor, such as the key actions within an action plan. It is also beneficial to have deadlines and identifiable results. It is important that you keep track of the criteria, ensuring that outcomes are being achieved, if they are not then intervention may be required, such as:

- Resetting deadlines
- Providing further advice on an alternative approach
- Creating new actions as intermediary steps

Monitoring can also assist in reducing problems and can help pre-empt these:

- Consider potential problems that may arise
- Be on the look out for warning signs
- Assess the underlying causes

- Remedy the problems through action

It may be helpful to assign specific responsibilities to staff members to ensure that monitoring is undertaken efficiently and by those best placed to undertake it.

Evaluation

Evaluation assesses the success of the activity as a whole, usually at the end or at an interim stage. The purpose is to improve future performance, and it is useful to consider the process, as well as the goal. A good way of getting information to evaluate is by asking stakeholders, for example users of a service, although it can be difficult to get 'honest' feedback. It is often useful to disseminate your findings to stakeholders. Successful evaluation can provide the following information:

- Has the goal been achieved?
- Where the actions correct?
- Where the methods appropriate?
- Was management/ delivery efficient?
- Could partners play a greater role?
- What key lessons have been learnt?
- Could you improve next time?
- What else is needed?

Approach To Monitoring and Evaluation

The Charities Evaluation Services (CES) has developed a five-step approach to monitoring and evaluation, which is based on a model of self-evaluation that recognises the emphasis on aims and objectives.

- **Step One, What Are Your Aims.** It is useful to review your projects/ services aims and objectives when undertaking evaluation to ensure that they are appropriate. It is important to distinguish between your aims and your objectives.

Fact Sheet 18 – Monitoring & Evaluation (continued)

- **Step Two, What Are Your Objectives.** It is important to review your objectives on an ongoing basis to ensure that they are relevant. Having clear aims and objectives in place can help you to decide what information you need to collect and to assess.

- **Step Three, What Are Your Performance Indicators.** These will help you assess the progress and success of your project/ service. CES identify two types of performance indicators, as follows:

  - **Output Indicators.** These help to assess your progress towards your objectives.

  - **Outcome Indicators.** These help to assess the changes that take place as a result of your project/ service, and show progress towards meeting your aims.

- **Step Four, Monitoring.** You should collect information on a wide variety of issues relevant to the project/ service. This is most likely to include information relating to your outputs and your outcomes.

- **Step Five, Evaluation.** Undertaking the above four steps can help you collect the most relevant information to evaluate your project/ service, which will help to answer key questions that can feed into your future planning process.