

Fact Sheet – Monitoring and Evaluation

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Monitoring means that we are looking at and keeping an eye on what is happening.

Some examples of monitoring are: → counting the number of people who use your services → noting what ethnic groups are accessing the service → asking users how they heard about the service → recording what is spent on stationery supplies → asking people's opinion of the service or during events etc.

Monitoring information should be collected at specific times: daily; monthly; quarterly or as people are leaving an event for example. This information needs to be looked at so that we can question and consider how well we are doing. This is the link between monitoring and evaluation; where the monitoring information collected becomes the basis for the start of evaluation.

Evaluation means that we are making some observations and judgments on the information or figures we have collected when monitoring. Some assessments which might be made are whether → the numbers using the service are going up or down → the new leaflet has brought the service to the attention of a more diverse group of people → our costs are getting higher → the service / activities are meeting the users' wants and needs.

Why Monitor and Evaluate?

Using monitoring information to evaluate not only measures how well you are doing but also can be used to inform possible funders. In addition it can assist in your service becoming more effective through interrogating the findings from your monitoring procedures. The kind of cross examination and probing which can be made is:

- Are our services meeting the needs of the users we want to target?
- How can our services be improved, what works and what doesn't?
- Did we achieve what we set out to do when providing our services or organising events?
- Are we achieving the outputs and outcomes agreed within our contracts?
- What lessons can we learn from the work we have been doing over a particular period of time?

Monitoring and Evaluating Policy, Practice and Procedures

- Without monitoring and evaluating we cannot hope to answer the questions above or any others which may need informed consideration
- Without keeping records in a systematic way it becomes difficult to monitor effectively

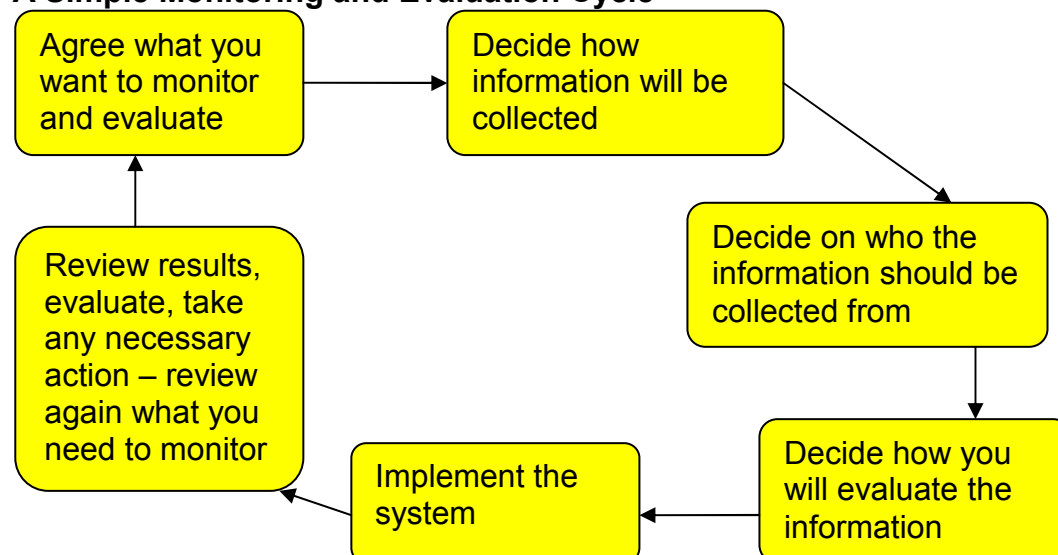
Monitoring and Evaluating Policy, Practice and Procedures (cont.)

- Without regular examining, assessing and reviewing the findings of the monitoring procedures, evaluations will not be effective
- There is a need to identify who will be responsible for the organising and overseeing of any monitoring & evaluation policy, practice & procedures.

What is important is that:

- It is clear what should or needs to be monitored for an effective system to be in place
- It is clear about how it is recorded so that the system and information gathering is reliable
- There is a regular, systematic and disciplined evaluation of the results of the monitoring procedure
- Action (or explanation of why no further action is to be taken) needs to follow any evaluation undertaken
- The monitoring system in place is reviewed to decide if it is actually capturing the information needed, wanted or which should be known.

A Simple Monitoring and Evaluation Cycle



Monitoring and Evaluation can be carried out at a number of levels. They can be simple, for example, noting people's names, ages, postcodes or courses they have attended. The more complex may involve asking questions on a survey form. This may rely on other skills, for example, how to create a clear questionnaire and how easily or not the answers can be collated and summarised so as to make sense.

Do ask other organisations if they have undertaken any similar monitoring and evaluation and learn from their experience and good practice.

The **Charities Evaluation Service** has produced some booklets on various aspects of monitoring and evaluation 020 7713 5722 www.ces-vol.org.uk
Voluntary Action Sheffield's Monitoring & Evaluation information sheet www.vas.org.uk

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