Full Guide:

Monitoring and Evaluation

Showing the difference you make: a guide for voluntary and community groups.

The importance of the work you do and/or the value of the service you provide may seem completely obvious to you - of course it's necessary and important or you wouldn't be doing it!

Unfortunately, if you rely on other people or organisations to provide you with the funds to do this work, you need to be able to demonstrate, with clear evidence, the difference you are making as a result of your activities – your 'impact' and how this is achieving your aims and objectives of your organisation.

This information sheet briefly outlines some of the basic principles around measuring and demonstrating impact and signposts you to further information. In order to know what impact you are making, you'll need to monitor and evaluate your work.

Before you start thinking about monitoring and/or evaluating your activities it might be useful to understand some of the commonly used terms associated it.

Overview of some of the terms often used in monitoring and evaluation:

- **Monitoring** involves numbers – how many people came, how many courses you ran, how many people gained qualifications or got 1:1 support.

- **Evaluation** involves looking at the successes and failures of your project or organisation, and asks questions about how good your service is, and the difference it has made.

- **Inputs:** the resources you put into a project or activity, such as staff time, volunteers' time, equipment, expenditure and other assets. For example, you might want to check how much money you spend on a particular activity and then assess this against your expectations.

- **Activities:** the work you do - planning a new service, producing promotional materials, running a training session, managing volunteers….

- **Outputs:** the products or services an organisation delivers such as training courses, publications, a helpline, or a website.

- **Outcomes:** these are the changes or differences made as a result of the output.

- **Impact:** the benefits or changes (longer-term) that happen as a result of your work. They include obvious changes, such as someone being housed, as well as less tangible soft outcomes, such as a shift in confidence or opinion. These might be harder to monitor on a routine basis.

- **Experience/quality:** how people feel about their involvement with your organisation. For example, you might want to find out whether your users enjoy or are satisfied with the service they receive from you, or how happy your stake holders are when working with you.

Basic Principles

It's impossible and unnecessary to measure and assess everything you do, so it is important to think carefully about what information you actually need and why. Only collect data you will use and try and build its collection into your day-to-day activities – use photographs, details of who attended events, and ask for feedback from your clients/users when they use your service.

It is also important that the records and data you are recording is kept effectively and that you are analysing the results and using them.

When evaluating your services, which should be done on a regular basis, you should involve all your stakeholders in the process so include your service users and partners for example and ensure you communicate the results back to them.

Get into the routine of collecting data and using it, however if funders are looking for specific information on your service then it is vital that this is the information you give them not what you think they want.

How good do you think you organisation is at monitoring and evaluating the services it provides? You can access a simple worksheet from the Voscur website (Bristol's agency that supports voluntary action) to check how well you are doing.

http://www.supporthub.org.uk/sites/supporthub.org.uk/files/Monitoring%20and%20Evaluation%20Assessment.pdf

Monitoring and Evaluation Cycle

In simple terms, monitoring and evaluation can be thought of in four key phases:
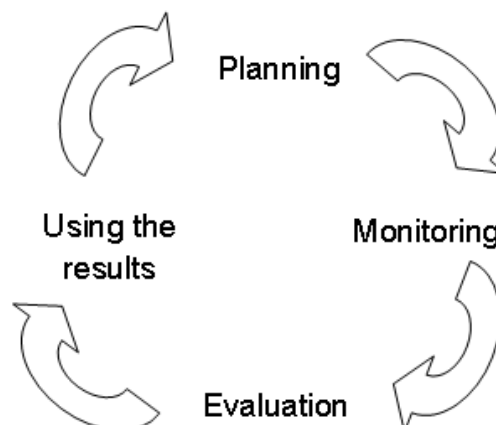
Planning:

This is the first stage in monitoring and evaluation cycle. Considerations at this key stage could include:

- Why are you monitoring and who is the evaluation for?
- What do you need to monitor and evaluate?
- How are you going to gather the data?
- Who is going to be responsible for gathering the data and do they have the correct skill set to do so?
- When is the data going to be gathered? Think about when it needs to be reported on.
- Are there any resources or additional outside support you need to complete the data collection and its analysis?
- What are you going to do with the data gathered?

Monitoring:

This is the second stage in the cycle and looks at what to monitor and how to do it.

At this point in the cycle, you should define your outputs, outcomes and impact(s). See the definitions of terms above. Monitoring can record:

- Service user profile
- Minutes of meetings and case records
- Data on number of people using your service
- Any feedback recorded (e.g. from training)
- Complaints and compliments made by service users

Evaluation:

This is the third stage in the cycle and can cover both internal and external evaluation to make conclusions about the services you provide. It is about using the data collected to make changes and improve your services. Data collected at the monitoring stage might raise additional questions that need to be answered at the evaluation stage. Extra time should be set aside to explore the additional questions and collect the appropriate information. Monitoring should be completed with the evaluation in mind.

Using the results:

This is the last stage in the cycle and is focused on reviewing your services and developing them further. Learning from the monitoring and evaluation of your services is vital and makes the time invested in completing data gathering and analysis worthwhile. You should use the results to feed back into the planning and development of your services and can demonstrate the progress made by service users. You can also use the results to tell others about what you have learnt and share best practice as well as on a wider scale influencing policy change.

Resources

- **Big lottery fund** - Their guidance around Outcomes is good.
  http://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/aims-and-outcomes

http://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/tracking-project-progress

- **Charities Evaluation Services (CES)** provides support and advice on quality and evaluation systems for the voluntary sector - their tools to measure 'outcomes' are good.
  www.ces-vol.org.uk.

- **Evaluation Support Scotland** have some helpful resources and guidance on impact measurement (and evaluation & monitoring more generally).
  http://www.evaluationsupportscotland.org.uk/

- **NCVO** has a range of information and advice on their website, along with useful publications and links to further information
  http://www.ncvo.org.uk/practical-support/impact

- **New Philanthropy Capital** are currently developing tools and ideas for the sector around outcome measurement.
  http://www.thinknpc.org/our-work/our-services/measuring-impact-2/

- **Prove and Improve -** Quality and Impact Toolkit for a quality and impact toolkit for charities, voluntary organisations and social enterprise.
  http://www.proveandimprove.org/

- **The Outcomes Star** is one tool that can be used (fairly simply) to look at changes for an individual in their well-being. Standard stars are available for a wide range of organisations. www.triangleconsulting.co.uklthe-outcomes-star

For more information or support monitoring and evaluation, or to have a look at the full range of information sheets available from Devon Voluntary Action (DeVA) visit http://www.devonva.org/information_and_guidance **or contact DeVA on 0845 6099901 or by emailing** support@devonva.org.

This is one in a series of information sheets produced by DeVA on subjects of interest to voluntary and community groups. It is intended for guidance only and is not a comprehensive statement of the law. Last updated February 2014. Please note that links may become out of date and invalid.