

Monitoring and evaluation

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1 | What is meant by monitoring and evaluation?

Monitoring means that we are looking at, keeping an eye on, and recording 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.

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 the two – where the monitoring information collected becomes the basis for the start of evaluation.

Evaluation means that we are making some observations and judgements on the information we have collected when monitoring. Some assessments which might be made are whether:

- The numbers using the service is 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 or activities are meeting the users' wants and needs.

2 | Why monitor and evaluate?

Using monitoring information to evaluate not only measures how well you are doing but also it 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?

3 | Monitoring and evaluation – policy, practice and procedures

You need to be capturing and recording key information on your organisation's activity in order to look back and review it. It's important to record the right information and to be able to collate and use it in a way that is useful. You need to be recording:

- Details of services delivered by the organisation and the work it has done – this will be numbers (e.g. number of training courses run, events held) and more descriptive information (e.g. content of the training, how it was publicised).
- Details of who uses the organisation's services – who they are, key information about them (esp. if you are aiming to reach a particular group of people).
- Users' experiences of your organisation's work – feedback, complaints/compliments/comments.

You may be recording this information through forms that you ask people to complete, through registers at events, internal records of activities, staff appraisals. Users' feedback may be collected via feedback forms, comments books, activity evaluation forms. You may collect information in less formal ways: audio or video recordings, diaries, blogs, photographs.

You then need a systematic way of storing the information you are collecting. This does not need to be elaborate as long as it is well organised. In whatever way you store the information you will need to extract and collate useful summary information on performance. Monitoring should be built into the way the organisation works and part of delivering its services. Also be clear about whose responsibility it is to record various pieces of information.

You should schedule evaluation at regular intervals. Don't leave it to the end of a project or funding scheme; effective evaluation is about seeking to improve the way the organisation works. Arrange the evaluation of an activity so that areas for improvement can be acted on. This means leaving room for change – you can recognise how well you are doing and still acknowledge that you can do some things better.

Your monitoring and evaluation system itself can be evaluated to see if it is capturing the information you need and highlights relevant areas for improvement.

Further help

Ask BVSC Helpline

0121 678 8888
askbvsc@bvsc.org

Development Agencies website

Links and information for developing voluntary and community organisations.
www.birmingham-da.org

Charities Evaluation Service

Booklets on various aspects of monitoring and evaluation.
020 7713 5722
www.ces-vol.org.uk

Voluntary Action Sheffield

Monitoring and evaluation information sheet.
www.vas.org.uk

Monitoring and evaluation is a process of seeking to continually improve the organisation's activities. An organisation that effectively monitors and evaluates its work will be more responsive to the needs of its users and provide them with better and more appropriate services.

4 | A simple monitoring and evaluation cycle

