

Checking that your group or project is on track to achieve what it set out to do needs to be done on a regular basis. It should be an exercise which will inform any changes or improvements that need to be made. Records will need to be kept from the start of any project.

How are they different?

Monitoring is the routine collection of information about your work. The information might be about activities, products, services, users, or about outside factors affecting the organisation or project. You can use this information to report on the progress of your project and to help you evaluate.

Evaluation is using the information you've collected to assess the value of what you're doing. This could be the value of the organisation as a whole, a particular project or one small element of what you do. Its also about using the information to make changes and improvements.

Where to start

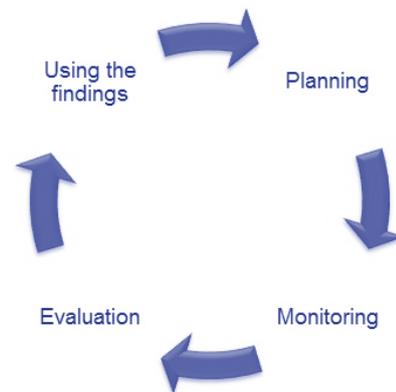
The monitoring, reviewing and evaluation of your project needs to be planned from the very start and linked to your evidence of need (see our Project Planning guidance sheet). Be clear about what your project is aiming to achieve and how its tackling the need you've identified. This should be used as your baseline, which you can check against to make sure your project is on the right track.

Be clear what **outcome** you're aiming for i.e. *Older people feel less isolated in rural areas* and the **outputs** you will be delivering to achieve that i.e. *a weekly community café with transport provided.*

With this in mind, set up anything you need to monitor your progress, from the start. These might include survey forms for users of your project, a method for evaluating events or recording the number of people using your service. Decide how and who will review the information you're collecting.

Monitoring and evaluation cycle

Charities Evaluation Service suggests there are four key phases in the monitoring and evaluation cycle:



Keep Good Records

- Set up monitoring systems and spreadsheets from the start and who will be responsible
- Decide who needs to be kept informed and how often; know who your stakeholders are

Collect Information

- Quantitative or qualitative?
- Consider existing documents and records

Communicate and Reflect

- Once the information has been analysed communicate accordingly
- Improve the project and use the information to inform future work

Stage 1: Planning

Planning is a key stage in the monitoring and evaluation cycle. Organisations should think about:

- Why do we want to do it and for whom?
- What will we monitor and evaluate?
- How will we do it?
- Who will do it, do we have the right skills?
- When will we do it?
- What resources will we need, including outside support?
- What will we do with the information we get?

At the outset of the project you need to be clear what you expect the outcomes of your project to be and that the work you're doing (the outputs) will lead to those outcomes.

Stage 2: Monitoring

There are two types of information you could collect, quantitative and qualitative:

- **Quantitative** is a measure of information by quantity, such as number of respondents, amounts, percentages, scorings etc.
- **Qualitative** is concerned with peoples' opinions and views obtained through interviews, focus groups and written feedback etc.

Ways that you could collect information include: interviews, workshops, surveys, focus groups and observation.

Remember that you will need to monitor expenditure and may also want keep track of staff and volunteer time too.

Stage 3: Evaluation

Reflect on the findings, consider how you will improve your work as a result of them and how this information will inform future projects.

Remember, if your evaluation shows that initial objectives haven't been met or the project didn't work; this doesn't necessarily mean the project was wrong or the people working on it weren't effective. It may be due to external factors outside of your control.

What you need to ensure is that you learn from the experience i.e. WHY it didn't work.

Stage 4: Using the findings

Using evaluation findings is the final stage of the monitoring and evaluation cycle. It is what makes the time invested worthwhile. In this final stage:

- Make use of the findings to feed back into, and guide, the management of the organisation or project
- Make use of the findings to demonstrate progress and results
- Tell others about what you have learnt including users and funders of your project.

More information

ACT Development Officers can offer further support and advice. A range of additional Guidance Sheets are also available on our website: www.cumbriaaction.org.uk

More information about marketing and evaluation is available on these websites:

www.ces-vol.org.uk

www.evaluation.org.uk

For more information please contact us at ACTion with Communities in Cumbria on Tel: 01228 817224 or visit our website: www.cumbriaaction.org.uk

ACT champions community and rural issues

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