Monitoring, Reviewing and Evaluation

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

Where to start

Look at the 'big picture'. The monitoring, reviewing and evaluation of your project needs to be planned from the very start, which is linked to your evidence of need (see our Project Planning guidance sheet). Your evidence of need should be used as your baseline, which you can constantly check against to make sure your project is on the right track.

With this in mind, it's important to set up your systems, such as forms and spreadsheets from the start, to help monitor performance. Decide when and who will review them and how it will be done. Monitoring, reviewing and evaluation can be thought of as a series of questions that should always be posed during the project:

- **Monitoring,** "Are we still doing what we set out to do?", "Are we any closer to achieving our aim?", "Are we keeping to budget?"
- **Reviewing,** "What's changed since we originally started out?", "Why has this changed?", "Was this forced on us, or did we realise our original course of action wasn't working?", "Has our changed course of action worked?"
- **Evaluation,** "Can we do it better?", "Is the project still worth doing?"

Projects and their processes

All projects follow a similar natural process;

- Pre-project – the initial realisation that something needs to be done, needs analysis carried out
- Project start up – the necessary behind the scenes activity before the project officially launches, such as governance arrangements, bank accounts etc
- Implementation – the project is up and running and trying to achieve its aims
- Sustainability – the project no longer relies on outside help for financial support
- Replication – the successes of the project can be delivered elsewhere by others based on lessons learnt from your project, or the findings are adopted into policy at local and/or national level

Monitoring, reviewing and evaluation should be carried out at every step of the project's process, and the learning carried through to the next stage.

By carrying out this continuous reflection, disasters are less likely to happen, like running out of money in the first year of a three year project, and unexpected outcomes can be dealt with as they arise without derailing the whole project.

Keep good records:
- Set up systems and spreadsheets from the start to help monitor performance
- Decide who needs to be kept informed and how often; know who your stakeholders are
- Decide who will be responsible for reviewing the systems and information

Information:
- Quantitative or qualitative?
- Research existing documents and records
- Consult with people

Collecting the information:
- Keep it short and to the point
- Decide how to want to collect your information and the number of responses you need
- Think about how you will analyse the information

Communicate and reflect:
- Once the information has been analysed communicate accordingly
- Improve the group/project and use the information to inform future work

Types of Information

There are two types of information to 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.

Methods of collection

Suggested methods for collecting information are:

- Interviews – face-to-face, telephone, structured, semi-structured
- Workshops – formal and/or informal
- Surveys
- Focus groups
- Observation

This list is not exhaustive and there are other methods you can use.

Contact ACT for further guidance on undertaking these activities.

Monitoring

Monitoring can be used in a number of ways to assess the impact of a particular project for example:

Effectiveness: Has the group/project achieved what it set out to achieve e.g. in terms of:

- Aims and objectives
- Outputs and outcomes
- Indicators and targets
- Standards and benchmarks

Efficiency: Has the group/project provided good value e.g. in terms of:

- Use of group/project resources
- Comparison with similar groups/projects
- Comparison with different projects

Reviewing

Once you have gathered the information, you will need to review and analyse it. If possible, seek advice from a third party to conduct an audit of the way the process has been carried out.

Once this has been done you will need to think about how the findings will be communicated to your funders, steering groups and Trustees and other stakeholders. Acknowledge the input of those who have been involved in providing the information. Ensure that the findings are communicated in accessible language and format and engage them in discussion about the evidence and findings as appropriate

Evaluation

The findings need to be reflected upon by the group. Consider how you will improve the group/project or event as a result of the findings and how this information will inform future projects etc. Learn lessons and communicate with your stakeholders, funders etc.

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 didn't it work etc.

Useful websites

www.cumbriaaction.org.uk
www.ces-vol.org.uk
www.evaluationtrust.org
www.evaluation.org.uk

More information

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

For more information please contact us at Action with Communities in Cumbria on Tel: 01768 840827 or visit our website: www.cumbriaaction.org.uk

Supporting communities … championing rural issues

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