

CAG Consultants' Top 10 tips for monitoring and evaluation

All too often, people see monitoring and evaluation as a pointless, time consuming chore. Our top ten tips will help you to monitor your work and effectively use the information you gather.

1. *What's the difference?*

Monitoring is regularly collecting data that you can use to show how your work is progressing over time. Evaluation is where you and your organisation review the data to see what it is telling you, look at your work in the light of this information, and decide whether any changes need to be made.

Example: *A project's monitoring data showed that 30% of the people who were using its advice services were from black and ethnic minority communities. However, when the management board reviewed the data, they realised that over 50% of the local population was from black and ethnic minority groups. They decided to provide more publicity about the services, recruit volunteers with relevant language skills and train them to act as translators, and worked with the Pakistani community centre to provide a session in their building.*

2. *KISS*

Keep It Short and Simple – the easier your systems are to use, the more people will be willing to use it and the more consistent the information you gather will be.

3. *Build it in at the start*

If everyone is expected to collect information from the start, they will plan their work so they can do this. It is also a lot easier and less time-consuming to do it as you go along rather than try to go back and collect data from case notes and other records that may not have been designed to include it. Building it in from the start gives you a chance to pilot your systems and provide any training that your staff and volunteers might need. Contact CAG Consultants if you need help with designing your systems or with training.

4. *Make sure you know what your starting point is*

If you don't know what your starting point is, then you won't be able to tell what changes have happened, or be able to assess what role your work has had in bringing these about. Sometimes called **baseline data**, the type of information you will need to look at will vary according to the type of work your project is doing. For example, if you want to increase the number of people using a park, you will need to know how many are using it before your work begins. If you want to improve residents' opinions of their local area, you will probably need to do some sort of survey to find out what they think of it now. Contact CAG Consultants if you need help with gathering your baseline data.

He uses statistics as a drunken man uses a lamp post – for support rather than for illumination.

Andrew Lang

5. *Who is going to do it?*

Although project managers usually have overall responsibility for making sure monitoring and evaluation happens, they will probably need input from other people in the organisation. This might include project workers, reception staff and volunteers. Make sure you identify everyone who will need to be involved, and that they know what their roles and responsibilities will be.

6. *Why do you need the information?*

Don't collect information just because you can, or you think it seems like a good idea. This is a sure route to developing a cumbersome and over-complicated system that everyone hates and no one uses! You also need to look at what the information would actually *tell* you. For example, does your organisation count the percentage of phone calls answered within five rings – or does it look at the accuracy of the information people receive and how satisfied they are as a result?

'I checked it very thoroughly,' said the computer, 'and that is quite definitely the answer. I think the problem, to be quite honest with you, is that you have never actually known what the question was.'

Douglas Adams, *Hitchhikers Guide to the Galaxy*

Unfortunately, though, many funders seem prone to making this error, and if you have to collect information as part of a funding agreement, you may not be able to do much about it. It is still worth approaching your funder and asking them to explain *why* they need you to collect the information they have asked for and what they are going to do with it. If they can't tell you, there may be room for renegotiation!

7. *Trying to compare apples and oranges?*

Make sure everyone who is collecting information is doing it consistently and is using the same definitions, otherwise you end up trying to group clients or approaches that really are not comparable. You may have to decide in your organisation what a particular output means, or approach your funders for guidance. For example, many organisations count the number of people 'supported' or 'assisted' through their work. Is 'support' a five minute phone call? Or six months of counselling?

8. *Bean counting*

One of the reasons people dislike monitoring is that they say all too often, all it does is produce lots of figures that don't actually tell them anything. You can avoid this by making sure that, as well as numerical data or **outputs**, your systems look at the **outcomes**, or changes people experience as a result of your project's work. For example, as well as looking at how many people have completed a particular training course, you can also look at what skills they have gained, whether their confidence and self-esteem has improved or whether they feel they are more likely to get a job as a result.

The Government is very keen on amassing statistics. They collect them, add them, raise them to the nth power, take the cube root and prepare wonderful diagrams. But you must never forget that every one of these figures comes in the first instance from the village watchman, who just puts down what he damn well pleases.

Anonymous English Judge
(Quoted by Sir Josiah Stamp in 'Some Economic Matters in Modern Life' (1929))

Some people feel this 'soft' or 'qualitative' information is too difficult to collect or too inconsistent to use, but there are techniques such as the Rickter Scale™ and Most Significant Change that you can use to help you. Contact CAG consultants if you need help with this.

9. *Resources*

If you are going to do monitoring and evaluation properly, it will take time and need resources from your organisation. Make sure you build monitoring and evaluation into your project plans and budgets and support your workers to carry it out effectively.

10. Blow your own trumpet

Effective monitoring and evaluation should help you gather information that you can use to help with your media and publicity your work and celebrate your successes. Make sure you feed back good news stories to the people who have helped collect the data (which includes your clients and service users) and to your funders. Be proactive – providing case studies and newsletters to your funders may help your project stand out, and help with securing funding in the future. It is also much more interesting to read than lots of tables of figures and finances! CAG consultants can advice you on your media and publicity work.