



Community &  
Voluntary Services  
cheshire east

# Intro to Monitoring and Evaluation

# Welcome



# Course Aims and Outcomes

## Course Aim:

This introductory session will look at the basics of monitoring and evaluating to help you report back to funders and stakeholders.

## Outcomes:

By the end of the session all learners should be able to:

- Understand the terms used in monitoring and evaluation
- Understand the basics of monitoring
- Understand the basic techniques of evaluating

## Terms used...

**Monitoring** is the ongoing process of regularly collecting and analysing relevant information to make sure you are doing what you set out to do. It tends to happen continuously, but sets of information may be gathered together at regular intervals, for example quarterly.

**Evaluation** is when you assess whether what you have been doing is really making the difference that you intended it to. It tends to happen less frequently, for example annually or at the end of a longer-term project.

**Quantitative** is statistical based data, 'hard' facts, numbers

**Qualitative** is more descriptive, a measure of opinion, attitudes, 'soft' factors

# The Logic Model – Input to Impact



# Why Bother?

What is the purpose of monitoring & evaluating?

- Keep records
- Gain information/ collect data
- Meeting funding targets/ requirements
- Understand stakeholder needs
- Service planning
- Collect evidence for future bids
- Develop reports/ feedback
- Measure impact
- Good Practice

## outcomes monitoring framework

Specific aims	Outcomes	Outcome indicators	Information collection methods	When and by whom	How to report and use
Aim 1					
Aim 2					
Aim 3					

## CES Planning Triangle

**Overall aim**  
or mission

**Specific aims**  
these set out the  
difference we hope to make

**Objectives**  
these set out how we plan to  
go about achieving our aims



**OUTCOMES**



**OUTPUTS**



# Plan, Do, Review.....





# What to monitor?

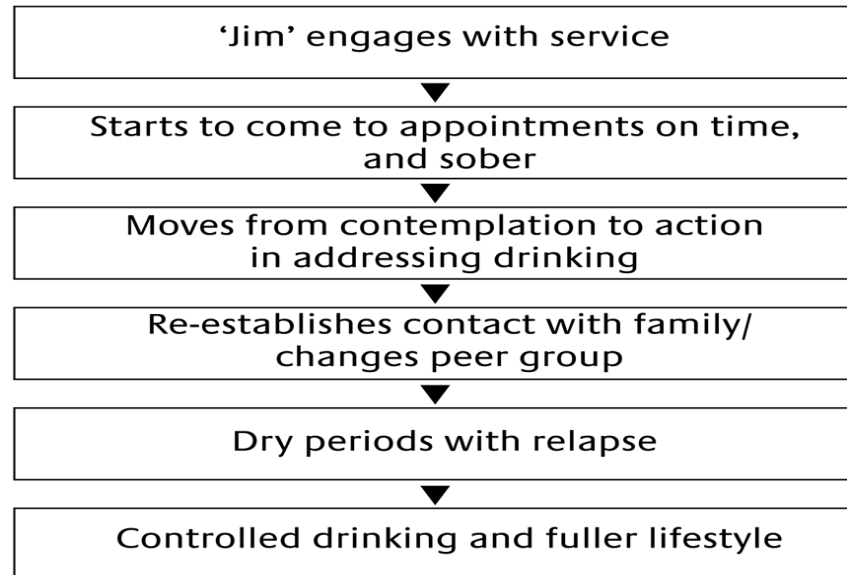
- Collect what you need for your own organisation
- Collect what you need for funders
- Output data – numbers attending, what you have delivered etc
- Identify outcome indicators – what do you measure to show success or failure to make a difference?
- Outcomes data – what difference has your project made?  
Single, significant changes.

# Intermediate Outcomes

## intermediate outcomes

Intermediate outcomes are the steps along the way to your end outcomes

### case study



# How to Monitor?

## What methods can you use?

- Sign in sheets
- Photos
- Publications
- Registration forms
- Questionnaires
- Face-to-face interviews
- Focus Groups
- Telephone interviews
- Group interviews
- Case Studies
- Diaries
- Sampling
- Observations

# Monitoring Tips

- Ensure information is collected regularly & consistently
- Ensure information is recorded in the same way & in the same place
- Monitor both inputs and outputs
- Check you are not duplicating data collection
- Build into any other paperwork
- Monitor your monitoring - Build in a review process – do it regularly!

**Replicability is key to evaluation!**

# Using Scales

Scale types include:

Frequency

Severity

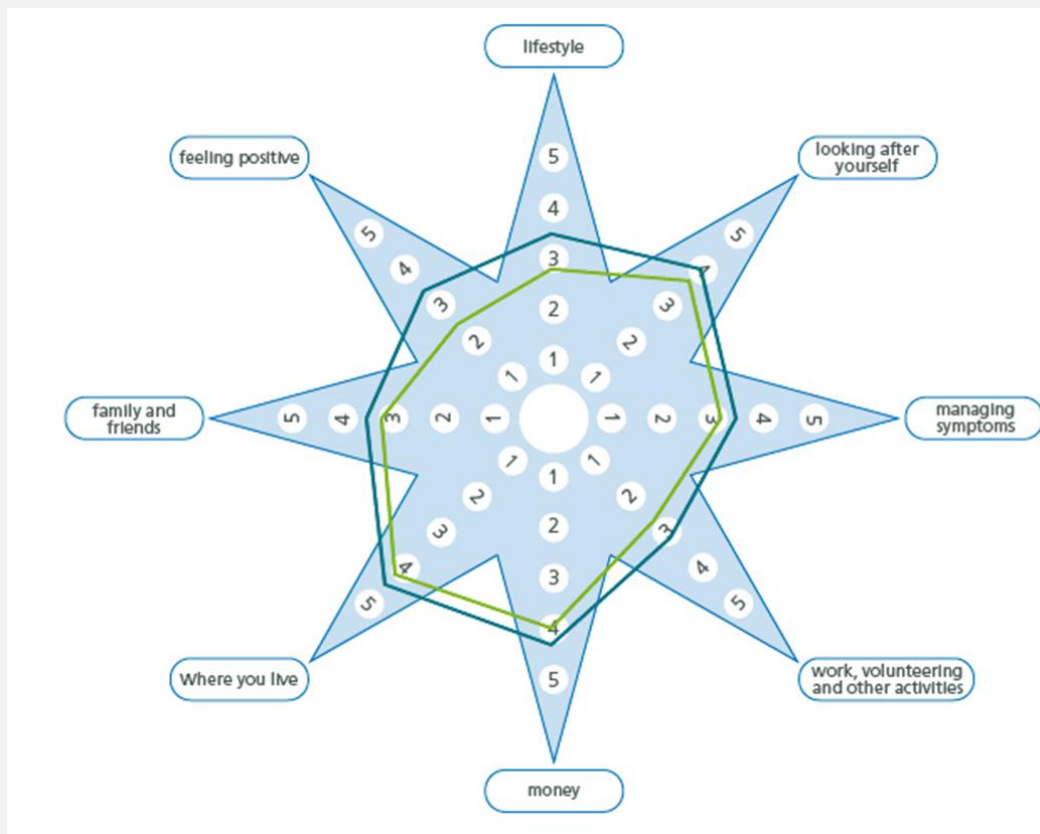
Satisfaction

Ability

Agreement

Consider the range of the scale – 3 / 5 /10 points?

# Outcomes star





# Keeping data

Identifiable data needs to be stored under the regulations of GDPR and the UK Data Protection Act – ideally with Consent, but otherwise some sort of legitimate interest

Store it where it can be used by everyone in the organisation

Keep data for only as long as necessary



# Reporting

## Who to and why?

- Purpose
- Audience
- Medium
- Resource implication

# Pulling it together

Monitoring and Evaluation Plan should include:

- What are the important things to evaluate?
- What questions do you need to be answered?
- How can you build it into your routine work?
- How will it be analysed?
- What skills may be needed?
- How will you ensure it is collected consistently?
- When is the information needed?



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# Any questions?