

## Monitoring and evaluating your community project

### Introduction

This briefing note provides a basic guide to the monitoring and evaluation of community projects. It explains what is meant by the terms, why monitoring and evaluating are important and relevant and the tools available to monitor and evaluate community projects.

### What is monitoring and evaluation?

**Monitoring** is the regular collection and analysis of information in order to inform decision making, ensure accountability and provide the basis for evaluation and learning.

Monitoring involves the regular review of a project's performance on both a quantitative basis (i.e. measurables like time spent, expenditure etc) and a qualitative basis (i.e. more general attributes such as how smoothly the project runs, the satisfaction of those involved etc).

Monitoring is information gathering work that takes place throughout the life of the project. Monitoring will help you answer questions about your project, and will be crucial when it comes to your evaluation of it.

Monitoring allows for making changes during the project.

**Evaluation** is a systematic examination of project, usually once it is complete

Evaluation aims to answer specific questions and to judge the overall value of a project. It should demonstrate what lessons have been learned that will improve any future actions, planning and decision making associated with project.

Evaluation uses the monitoring information you have gathered to make judgements about how well you are doing, i.e. what works and what needs improvement. It will reveal how well funds have been used and what the benefits are to all those involved. It will also help you create more successful, well managed projects in the future.

### The importance of monitoring and evaluating

There are many reasons why projects - of all types - benefit from monitoring and evaluation:

- Reviewing what has been done
- Measuring progress and identifying any failures
- Making improvements to the project
- Showing the impact on the intended target group community
- Showing volunteers and staff the value of their work
- Keeping control of finances
- Involving stakeholders and partners
- Demonstrating to funders that their money has been well spent.

From the list above it is possible to draw out four main reasons for undertaking monitoring and evaluation that are particularly relevant to community based projects.

### *1) Accountability*

Projects for which funding, time or resources have been provided by a funder or parent organisation will have an obligation to report, explain or justify their activity and expenditure. The project's manager(s) will need to demonstrate to the funder that the work has been carried out in agreement with the agreed terms and conditions of the contract or offer of grant.

Within community projects, this can be demonstrated by providing progress against agreed outputs, which are often quantitative (i.e. the number of community groups reached) or outcomes, which are often qualitative (i.e. how a person now perceives his/her environment) or a combination of both.

### *2) Securing future funding*

Ongoing monitoring and evaluation of a project provides current and future funders with evidence of what a project has achieved within a given time and what might be achieved with the continuation of the project in the future. It helps build a case for future funding.

When applying for funding for your project, you may be asked to demonstrate that the project meets a real need. Evidence from the previous evaluation of a project or projects, as well as lessons learnt from the existing project, can provide funders with this reassurance.

### *3) Checking progress of the project against aims and objectives*

Monitoring your project on a monthly, quarterly or yearly basis will provide a snap-shot of your progress.

This enables weaknesses to be identified and corrective actions to be put in place to ensure the aims and objectives are achieved.

### *4) Learning from your experience*

Monitoring and evaluation enables those running projects to learn from their experiences and make a confident assessment of what has worked and, often more importantly, what hasn't.

## **Monitoring**

Before you begin monitoring, bear in mind what you want your evaluation process to achieve (see below). This will help ensure that you collect the information you need to avoid missed opportunities and incomplete analysis.

Much of the monitoring process will concern the gathering of hard facts and figures (the quantitative data) such as money spent, work undertaken etc. This is normally straightforward, and is a fundamental part of project management.

But don't forget the qualitative side; how is the project being received, are people's expectations being met? Asking those involved in a project, either as partners, 'clients', target group etc, is an additional, and crucial way of gathering information, and there are various ways of doing this:

### *Questionnaire or survey*

A series of questions, to which the user responds by e.g. ticking a multiple-choice box or writing a fuller reply, can obtain responses which can be anonymous from a large number of people relatively quickly and easily, by post, face-to-face, email etc. The responses usually require analysis, and the questions must be well directed to ensure you collect the information you require.

### *Feedback forms*

Short forms - e.g. those handed out after training and similar sessions to discover if the attendee found the session useful allow people to state their views anonymously, and are filled in when the event or activity is fresh in the mind of the respondents. Note that as they are usually handed out at the end of sessions, feedback forms are sometimes filled in hurriedly.

### Interviews

Conducted face to face or by phone, interviews that run through a series of preprepared questions or topics which are good for obtaining detailed information and fuller responses. But interviews can be time consuming - and therefore costly in their setting up, conduct, transcription and analysis.

### Focus groups

A structured discussion among a group of individuals with a common interest, brought together to gain information about a specific issue, are very good at identifying respondents' true feelings about the issue under discussion and often generate thoughts and responses that might not have come from simple interviews. Focus groups need to be carefully planned and well facilitated to ensure that the information gathered is relevant. The information gathered is qualitative (opinions, insights and personal responses).

## **The evaluation**

Before beginning your evaluation, ask yourself the following questions.

- 1) What is the purpose of your evaluation? Why are you evaluating your project? Are you clear about what you want your evaluation to demonstrate?
- 2) Who are you evaluating for? Is this for your funders, your users, your organisation?
- 3) What are you going to evaluate? Which elements of the project do you intend to examine?
- 4) How are you going to evaluate? What methods are you going to use when carrying out your evaluation? You should aim to use a range of data collection methods and collect both quantitative and qualitative data.
- 5) How will you collect the data you need? Is the data you need available? If you require data across the project, have you set up adequate monitoring techniques to capture it?
- 6) What will you do with the data you are planning to collect? Data by itself is just data; you'll need to analyse the findings that your monitoring has collected and arrive at a conclusion to what they show. You also need to consider how are you are going to present the analysis and your conclusions.
- 7) How will you act on your analysis? All too often the findings of a monitoring and evaluation process end up gathering dust on a shelf. Make sure your findings see the light of day! Use the analysis to plan for the future; act on your conclusions and make the evaluation work for you.

## Points to remember

- 1) Before starting your project, consider what you need to evaluate and how you will need to monitor to achieve this.
- 2) Don't just focus on statistics; it is as important to obtain qualitative information e.g. people's experiences, feelings and empowerment.
- 3) Be realistic about the time lag between starting a project and the effects it has. Community based projects need a longer lead in time so don't expect to gain instant results or something to evaluate in the short term.
- 4) Monitoring and evaluation should be a positive step in a project that benefits all parties involved the delivery organisation and its staff, the users and the funders.

## Examples

Here are three examples of evaluation and monitoring techniques and/or processes used by real on-going community based projects.

### 1) *Warmer Improved Somerset Homes (WISH)*

Warmer Improved Somerset Homes is a recently launched project which works with the over 60s to make their homes more energy efficient, to ensure they are receiving the benefits they are entitled to and to carry out some free home improvements such as basic repairs and adaptations.

A system for monitoring and evaluation has been built into the project from the start. A decision has already been made concerning what quantitative data will be collected (e.g. the numbers of repairs done to homes, the number of people helped with benefit advice etc). This up-front commitment to systematic measuring was central to the successful search for financial backing as the funder (Big Lottery) requires provable evidence of outcomes.

More challengingly, the project team is also preparing to collect qualitative information from the people that the project is designed to help. This will be done in the form of questionnaires filled in when contact is first made and then after home improvements are done or benefits referrals are made. This will attempt to assess less tangible quality of life changes such as 'my home feels warmer now' or 'I have more contact with my neighbours'. Investment, in terms of time, is being spent in building up relationships with the elderly people involved in order to encourage fuller responses to the questionnaires and therefore increase the usefulness of the information gathered.

### 2) *Hampshire Solar Challenge*

The Hampshire Solar Challenge is a completely different kind of project from WISH (above) with a different target audience and objective. It aims to teach children about renewable energy by building and competitively racing solar-power cars. It has run annually since 2001.

The collection of quantitative data - the number of schools and students involved, and the numbers attending the 'energy fair' at which the solar-car race is the chief attraction - is relatively straightforward. Valuable additional information is gained through relatively detailed (4-page) feedback forms given to participating schools. This picks up on anything that does not work for the schools, but also provides positive feedback which allows the project team to justify continuing to spend money on this initiative.



Equally valuable "soft" outcomes, such as 'how did the children experience the project' and 'did the project raise awareness of renewable energy among children, parents and others' tend to be evaluated in open discussion among the project partners at subsequent meetings. The purpose is to find ways of developing the event in subsequent years, adding value to an already successful formula and further raising awareness of the issues.

### 3) Working Herts

Working Herts recruits and trains unemployed young people in Hertfordshire and South Bedfordshire to install energy-saving and water-saving measures in private homes and local authority and social housing. The project places a great emphasis on quality and therefore monitors customer satisfaction very carefully. In fact, the monitoring of customer satisfaction is an integral part of the overall project and feeds directly into the training of the young people.

At each property where Working Herts has undertaken work, the householder receives a customer form inviting comment on every aspect of the service. To help achieve a high rate of response, the forms are accompanied by return envelopes that have a rubber-stamped address and a postage stamp rather than printed address and freepost mark. This humanises the process and helps achieve the impressively high response rate of 60%.

The customer forms are widely evaluated, and used to drive the project forward. All the forms (around 1000 a year) are read by the Chief Executive who annotates the responses and passes them onto the trainees to read and comment on at their weekly breakfast meeting. The trainees find the process very meaningful; they use the responses to improve their working practice and so 'own' the answers, and in this way quality assurance becomes a training aid.

## Support from CAfE

If you want further help or information about monitoring and evaluation, then Community Action for Energy (CAfE) can provide the following:

- 1) We can put you in touch with other projects in our 2700 strong network that may have experience of monitoring and evaluation of community projects.
- 2) We have produced a series of case studies of projects (including Hampshire Solar Challenge and Working Herts, above) that have carried out monitoring and evaluation. These are downloadable from our website, [www.est.org.uk/cafe/resources/briefing](http://www.est.org.uk/cafe/resources/briefing).

Community Action for Energy is an initiative of the Energy Saving Trust.

For more information visit [www.est.org.uk/cafe](http://www.est.org.uk/cafe) or call 08701 261 444.

## Further information

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