Evaluating On A Shoestring

What Are Evaluation And Monitoring?

The terms 'monitoring' and 'evaluation' are often used together, and are sometimes confused. The Charities Evaluation Service provides useful definitions in their excellent downloadable guide:

www.ces-vol.org.uk/downloads/meonashoestring-795-803.pdf

'Monitoring is about collecting data that will help you answer basic questions about your project.'

'Evaluation is about using the data you collect to make judgements about your project, giving value to your work. Often an evaluation uses monitoring data, but may add more data to it, collected, for example, through interviews or surveys.' p.9

This factsheet focuses on evaluation.

Why Evaluate?

A good evaluation provides evidence of the impact of your work and information that can help you to improve your effectiveness.

There is no point doing an evaluation unless you want to find out what people really think of your project. You need to be open and curious and make sure those providing feedback feel safe enough to be honest and believe that you want to know what they really think.

> *'Be prepared to be open, and to be vulnerable – to say 'how do you find us?'.
> It's your motive for doing it – we genuinely want to know what this group is like.
> If we're going to be funded we need to know it's worth doing.'*

THE ALTERNATIVES EVALUATION

In March 2011 Alternatives approached Aston-Mansfield Community Involvement Unit (CIU) to ask for help with an evaluation of one of their projects. They wanted an external perspective to complement their internal monitoring and evaluation processes and to look for evidence of impact that could help them secure ongoing funding for the project.

Alternatives had a small budget available and CIU agreed to match this in kind with hours of a community development worker's time paid through the 'Advance to Deliver' programme. In order to make this useful to other community groups Alternatives and the CIU worker agreed to keep notes of the process. These notes have been used to produce this guide for VCS groups on how to evaluate the impact of projects on a shoestring budget.

Quotes in italics come from the staff at Alternatives reflecting on the evaluation at the end of the process.

You need to be clear who the main audience will be – who will read the evaluation? What kind of length, detail and language will suit them? If this is an external evaluation make sure the evaluator is clear about this too.

External vs Internal Evaluation

External evaluations cost money (unless you can find a skilled volunteer), but provide an objectivity and independence that can be difficult to achieve internally. If you think an external evaluation might be useful for a project you need to budget for this at the planning stage. Many funders are happy if you include these costs in your budget. It makes sense to get advice about costings early in the process. You can contact CIU or talk to an A2D worker about this.

It is important to work closely with the evaluator to ensure that you are all clear about what is happening and the evaluation meets your needs and works for your users.

> *'It's something that can be done much better externally. Internally you'd feel you'd come up with your own expectations. Externally you have to let all of that go – it's more honest.'*

External evaluations can feel scary because you have to allow access to someone from outside and trust them to do a fair and effective job.

> *'All our dirty washing's going to come out in public – I didn't think we had any but you just don't know. You don't know what people are going to say. There's the potential for being judged and to feel like you've failed.'*

An external evaluation is not something you simply hand over to the evaluator – you should be involved in thinking through the aims and scope of the evaluation, planning the process and making it happen.

During the planning phase it is important to carefully think through how best to approach different groups of people, what methodologies to use and what questions to ask. With an external evaluation this is likely to involve a series of conversations and it is important to get the decisions right. You know your users and your project and you need to choose approaches that will work for them:

An external evaluator should involve you in decisions about the process but make it clear that you cannot influence the outcomes:

> *'Right at the beginning you told us we couldn't change whatever comes up – that was when it hit me – that's the whole point and it was important to get that over to us. It's a bit of a risk – that vulnerability thing… you have to be prepared to take what's coming.'*

Internal evaluations, if planned and undertaken well, can also provide valuable information. Try to build evaluation activities into your project planning, beginning with a clear idea about what you want to find out, and collecting information from the start of activities if you can. It is possible to create a degree of objectivity by using staff or volunteers who do not normally work with the users to gather information from them, but this only works if you have enough staff and volunteers.

A2D workers can advise on how to monitor and evaluate your project and can provide access to resources suitable for the different groups of users you may have.

The Evaluation Process

What to cover

A focused evaluation is much more useful. Be clear, specific and realistic about what you need to know.

Evaluations can cover:

- What you've done (outputs/activities)

- Who you've worked with (users)

- What your stakeholders think (user satisfaction)

- What difference you've made (outcomes)

At its best, evaluation should be a central part of your activity, built in from the start of a project and not tacked on as an afterthought when funders request it!

Try to collect some baseline information – when people first make contact it can be helpful to gather a few details about them, especially if your project sets out to make a difference in a specific area of people's lives. You can then gather similar information at the end of the project to measure change and impact.

An evaluation must be set in context – how the project fits with the rest of your organisation's work, when and why it was set up, where you hope it is leading.

Who to involve

A thorough evaluation involves all stakeholder groups – all those directly involved with your project. You can work with representative or random samples or you could try to involve everyone by sending questionnaires to all, for example.

Different groups need different approaches. With this evaluation we spent some time discussing the best methods of gathering information and decided on:

- Brief interviews and questionnaires for parents

- Questionnaires for staff and volunteers

- An online survey for outside agencies

- Interactive play for children

Be aware of the potential impact of the evaluation – people may worry about the reasons behind it (is the project threatened? are they checking up on us?). People need to be told why the evaluation is happening and what it will involve if they take part.

Asking people to reflect on the impact of a project that has been very important at a personal level requires sensitivity and careful handling. Make sure you do no harm – being interviewed by a stranger when you're vulnerable can be unsettling and difficult.

In this evaluation a couple of parents got upset during interviews. It was the first time that some had thought about the significance of the project to them. On reflection the project staff felt this was a very positive process and are considering doing something similar themselves with the parents, like an annual review, looking back at their journeys as well as forward.

How to collect information

Keep it manageable – a clear focus, short questionnaires etc. Make sure the language used in the questionnaires and interviews is appropriate and makes sense. Simple things like using the right words to describe activities or places are very important.

Think about confidentiality. People will only be honest if they feel safe enough to do so. Be clear about who will see the information people share with you. Usually evaluation reports are anonymised so at the very least no names should be included, and you may also need to change identifying features so readers cannot work out who said what. Make sure you keep completed questionnaires, surveys and interviews securely and pay particular attention to safe storage of personal data.

Writing up and analysing takes far longer than fieldwork – with interviews allow 5 hours for each hour of interview to transcribe and analyse.

Think about the impact of the evaluation on the organisation

All evaluations take time and work which needs to be planned for. An end of project evaluation, whether internal or external, will have a more obvious impact because a lot of

activity happens in a short space of time. Efficient admin support will help – people to set up interviews or events, give out, collect and chase questionnaires.

Even with an external evaluation you need to plan for your own staff to make time available. Deadlines for tasks can help to keep things on track:

> *'The message for other groups is you need to be prepared to put some effort in, find time to respond so it doesn't delay things. It helped knowing what days of the week you were working on it – I knew I had to respond by a certain time.'*

If your organisation is large enough it helps to keep some distance between the people who deliver the activity being evaluated and those involved in making the evaluation happen:

> *'It was a good team effort – team building. We had others in the team so we could keep at a distance – that was good.'*

Using evaluation outcomes

Making sense of the information you gather can at times feel overwhelming. The aim is to discover themes – identify words/phrases/comments that come up several times or feel important. If you begin with a clear focus it will be easier to organise the information you gather.

You need to be curious about what comes out of an evaluation, and do something with it. An evaluation that simply gets sent to funders or put on a shelf will make little or no difference. There will be some findings that you can explain and know you don't need to look at further, and others that you need to explore and possibly respond to. An evaluation is a tool for change and needs to be used. Look for common themes – things working well that you need to do more of, things that could be improved.

By the evaluation debrief, the project organisers were already thinking through their response to some of the findings and had for example decided to ask the crèche worker to communicate with parents about what happens in the crèche and to look at ways to reduce the risk of dependency on the project.

They could already see a number of uses for the report:

> *'We'll show existing funders, prospective funders. It has such wonderful quotes in it we can use it in all sorts of ways. There's a lot of valuable material in it.'*

> *'I feel encouraged to do it more often. I think the end report will be a book that we're really proud of, that we'll keep going back to, keep wanting to see how we can get something like this to happen again, maybe do it internally but using different staff.'*

An evaluation should help your organisation move ahead more confidently, knowing what works and what could be better, what makes a difference and how your users feel about your service:

> *'The evaluation process has been enormously encouraging and has helped us think afresh about the challenges the future holds.'*

> *'This has been an excellent process. I'd recommend other groups to do it, to use you, to have an independent evaluation has been extremely valuable.'*

> *'We really appreciate that we've had this opportunity, you've been willing to work with us to push us to get the right responses… that process has been really positive. We're already using the outcomes.'*

SUMMARY CHECKLIST

- Are you clear about why you want to evaluate your project?

- Are you open to discover new things about your organisation and its work?

- Do you have a clear focus?

- If you decide to do an external evaluation have you budgeted for it?

- Have you planned sufficient staff/volunteer time to manage the evaluation?

- Have you included all the project stakeholders?

- Have you chosen the most appropriate methods for each group?

- Have you thought about collecting baseline information?

- Have you communicated with everyone who will be involved or affected so they understand what the evaluation is about?

- Have you thought about confidentiality?

- Have you planned how to use the evaluation outcomes?