



Funding Guides



FUNDING GUIDE 20 : How Well Have we Done : Evaluating Afterwards

- How have we done?
- Can we continue?
- Can we do better?

Monitoring and evaluation is crucial to the success of fundraising activity. Likewise, if you are seeking continuation or new funding, increasingly, funders expect organisations to show that they are able to plan ahead and deliver activities by learning from past successes (and mistakes!) and basically this is what monitoring and evaluation is about.

This Information Sheet covers:

- What is Monitoring and Evaluating?
- Why Monitor and Evaluate?
- Some Monitoring/Evaluating Methods

MONITORING:

Monitoring is systematically collecting information that will help you answer questions about your project. It is important that information is collected in a planned, organised and routine way and at specific times - daily, monthly or quarterly. All organisations keep records and notes and discuss what they are doing. This becomes monitoring when the information is collected and systematically checked against a plan. The information might cover activities/ services provided, number of users (to include their age, where they live, etc) or the type of work carried out with them. This information can be used to report on your project and to help you evaluate.

Monitoring the delivery of a fundraising strategy is a continuing function allowing both successful and unsuccessful strategies to be meaningfully reviewed. The successful aspects can be recorded and refined for future reference, while unsuccessful aspects will require intervention to improve performance, limit damage or find creative solutions to the problems encountered.

Keeping records also helps organisations to identify the level of demand for their service and whether there are particular needs in different communities. Collecting this kind of data can provide crucial evidence for funding applications and provide evidence that there is a need or demand for your services/activities.

EVALUATION:

Evaluation is about using monitoring and other information collected to determine the worth/ development of projects. Evaluation serves to assist and support projects from inception, development through to completion and evaluation processes should be built into the project from its beginning. As each project is different, the evaluation methods employed will also be different. Some large projects might use a range of evaluation tools while others require only very simple testing.

Evaluation involves using the information you have collected to assess or evaluate the success of your activities or project. This can be measured in many ways, but links into the original

aims and objectives of your project. It involves working out whether you have achieved what you set out to do, how you did it, what the 'outcomes' and 'outputs' were and whether you need to make any changes in the future.

The terms 'Outputs' and 'Outcomes' are often used by funders:

- **Outputs** are the **products** of your project or activities, such as numbers of people using your premises or the numbers of people accessing activities provided by your project.
- **Outcomes** relate to wider (sometimes less obvious) benefits such as someone feeling more confident about applying for grants from new sources after attending a training session on writing funding applications.

The level and extent of monitoring and evaluation will vary between different sized grants applied for and the requirements of the funders. When accessing European Funds or bigger lottery grants more detailed monitoring systems will be expected to be in place, to evaluate their projects to show the funders whether the project achieved what it set out to do.

WHY EVALUATE?

For learning and development :

Monitoring and evaluating your services will help you assess how well you are doing in order to help you do better. It is about asking what has happened and why - what is and what is not working. It is about using evaluation to learn more about an organisation's activities and then using what has been learnt.

For accountability, to show that you are effective :

Funders and other 'stakeholders' want to know if a project has spent its funding appropriately. Indeed, a condition of many of the larger grant schemes, such as the Heritage Lottery Fund's 'Heritage Grants' and the joint 'Repair Grants for Places of Worship' scheme (English Heritage and Heritage Lottery Fund), is that a project must be able to provide evidence of monitoring and evaluating and grant instalments will only be released after submission of regular reports. It is worth noting that the Heritage Lottery Fund provide information and guidance on self-monitoring.

Evaluation for accountability :

To demonstrate achievements. It is important for projects to find ways in which both the need for accountability and the need for learning can be met. Many funders are also becoming more interested not only in whether a project has worked, but why.

The purpose of evaluation will change the type of questions asked. For accountability, the questions might be:

- Has the project worked?
- How has money been spent?
- Should the project continue?

Whereas for learning, you might ask:

- What are the project's strengths and weaknesses?
- What are the implementation problems?
- Why have things worked, or not?
- What are the good practice issues?

Evaluation should not only answer questions, it should also prompt fresh thinking within your project and in your contacts with external agencies. If you have asked the right questions, an evaluation will tell you not only what you have achieved but also how you did it and what was most effective. It will assist you to find the areas where improvement or change is needed and help you to provide the best service for your users.

It is always important to set up ways of monitoring or recording work and setting time aside to assess whether your project has made a difference and achieved what it set out to do. This

type of long term planning and review is increasingly important in attracting funding into a group.

SOME EVALUATION AND MONITORING METHODS

You might find a well-known method is appropriate, if not, design your own or tweak a well known method to suit you. Look at other organisations and how they monitor and evaluate. Do what's right for you!

- **Asking questions** - much evaluation is about asking people questions about how the activity has gone and how it affected them. This can be done individually or in groups, either oral or written. Through the use of interviews, questionnaires, focus groups, group discussions, diaries, quizzes, evaluation/monitoring forms.
- **Observing** - an observer watches an activity and records what happens. The observer should not interfere with the activity and must be careful not to be biased by their own perceptions.
- **Keeping records** - set up your own internal recording system from the start of the project to include project plans; minutes of meetings; weekly/monthly records of activities/outputs, outcome measures, progress, reports to funders/other interested parties.
- **List Expected Outcomes in the Project/Business Plan** - this will help you judge if in reality the expectations have been met. If expectations have not been met is the project losing its momentum or were the expectations unrealistic at the start?
- **Feedback** - this can be received through evaluation forms; suggestion boxes; board blasting; a feelings tree; graffiti chart. Feedback from informal discussion and question and answer times are also valid and should be recorded for evaluation.
- **Take Up Rate** - this is the number of users, enquiries, etc. Categorising users into age, gender, geographical area, etc. This form of feedback will highlight not only your users but the gap in people using your facilities.
- **Communication audit** - a survey of the project's users to measure their knowledge about your services.
- **Follow up reviews** - choose a random sample of past users asking them to give comment on their experience of the services/facilities your project offered.
- **Analysis** - once data has been collected it needs to be disseminated, interpreted, analysed and presented. Data should be both quantitative and qualitative

Further Helpful Information:

The Churches Community Value Toolkit published by the Church Urban Fund is a useful resource for monitoring a church's community contribution both before and after a new project has been launched - see <http://www.cuf.org.uk/page18562133.aspx>

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