LIFT07 Workshop:
Do-It-Yourself Monitoring & Evaluation

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Agenda

1.   Explanation of Monitoring & evaluation

2.   Individual reflection: what can I evaluate?

3.   Overview of monitoring & evaluation tools

4.   Group work: setting the evaluation framework

5.   Conclusion

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Workshop Objectives

- Introduce the main concepts of monitoring & evaluation

- Have participants learn more about monitoring & evaluation and how it can apply to their work through:

  - Individual reflection

  - Group work

What is Monitoring & Evaluation?

- **Monitoring:** a day-to-day management task of collecting information to see the extent of progress in achieving results for a given project

- **Evaluation:** the systematic and objective assessment of whether a project has achieved its results or not
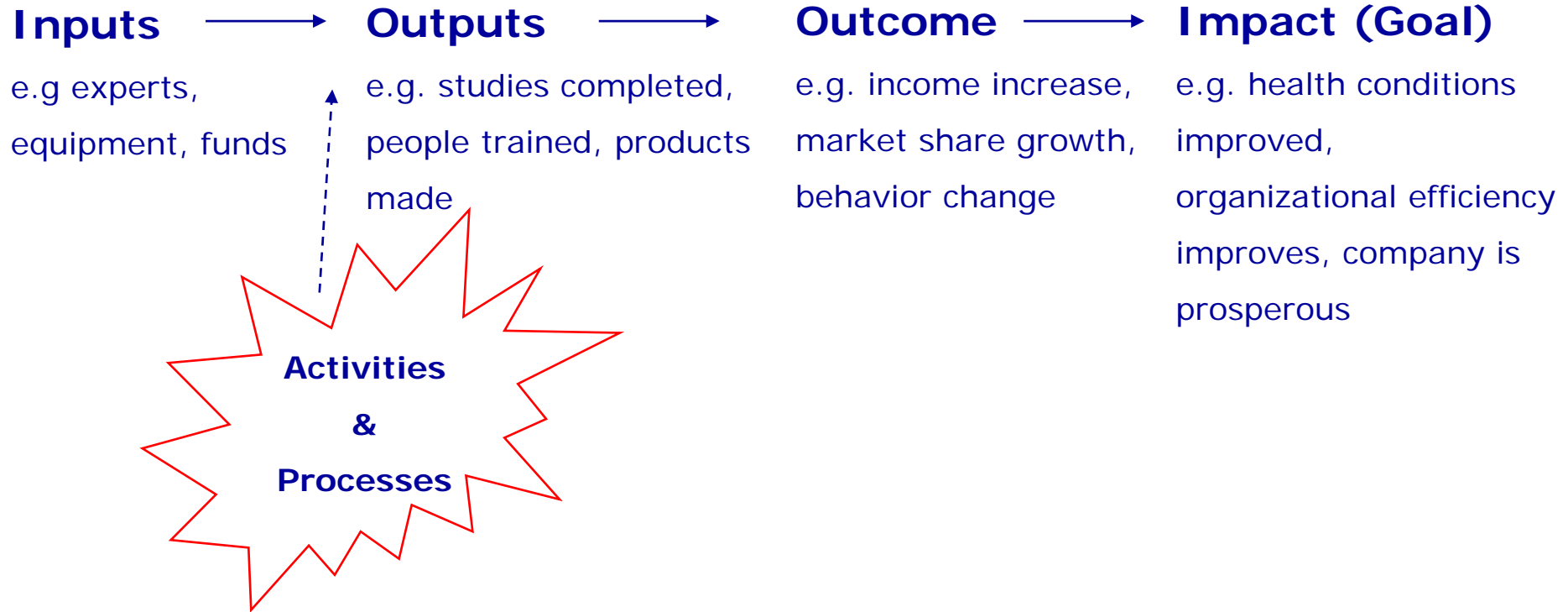
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Why Monitor & Evaluate?

- Project performance

- Planning, efficiency & effectiveness

- Accountability

- Knowledge production

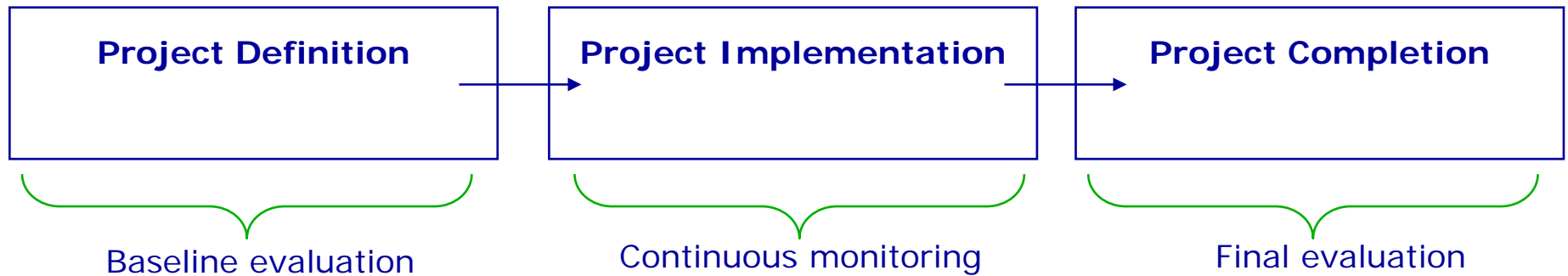- Institutional/social strengthening

- To "prove & improve"

Monitoring: *to know what is going on*

Evaluation: *to find out what happened*

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A Project Framework

Inputs ⟶ **Outputs** ⟶ **Outcome** ⟶ **Impact (Goal)**

e.g experts, equipment, funds

e.g. studies completed, people trained, products made

e.g. income increase, market share growth, behavior change

e.g. health conditions improved, organizational efficiency improves, company is prosperous

Activities & Processes

Timing of Monitoring & Evaluation

Project Definition	Project Implementation	Project Completion

Baseline evaluation   Continuous monitoring   Final evaluation

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Key Points on Monitoring

- Monitoring needs to be considered prior to a project

- Data and information collected needs to be analyzed

- Monitoring is not evaluation – but can make a final evaluation much easier to do

- Most monitoring activities you can plan and implement yourself

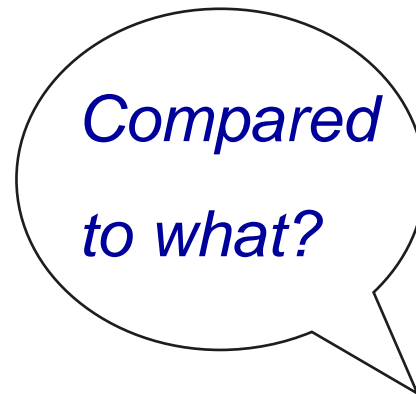- Monitoring does not have to be expensive

Key Points on Evaluation

- Evaluation "should" be planned into a project

- It is often difficult to evaluate projects with vague objectives

- Evaluation activities can both be done by yourself or outside specialists

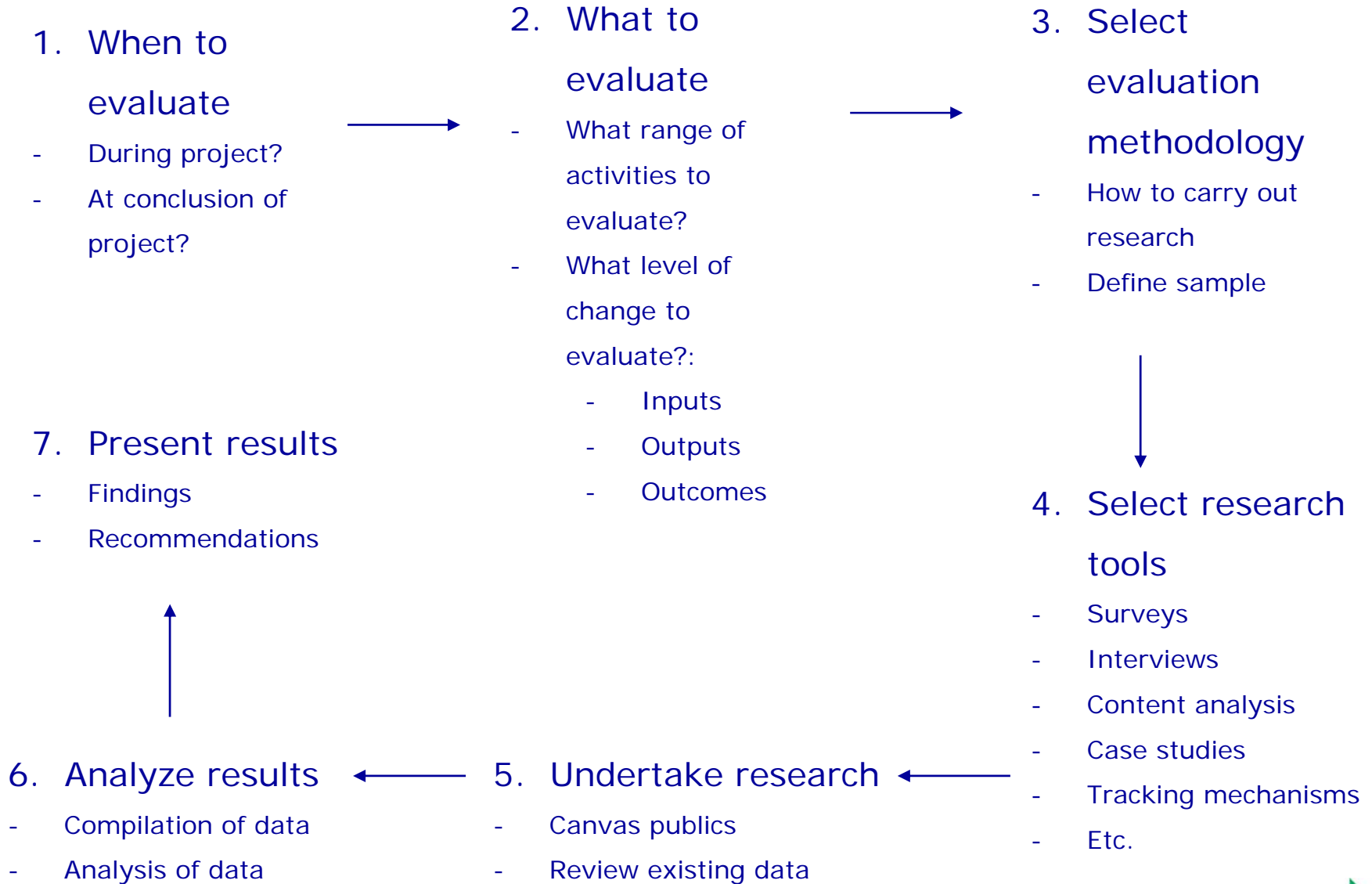- Evaluation, if properly thought through, does not have to be expensive

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Key Points on Evaluation

Some theoretical concepts to consider:

- "before and after" / "with and without" comparisons

- How to prove "cause and effect" ?

- Consider "methodological triangulation"

Life is difficult!

Compared to what?

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Evaluation Roadmap

1. **When to evaluate**
   - During project?
   - At conclusion of project?

2. **What to evaluate**
   - What range of activities to evaluate?
   - What level of change to evaluate?:
     - Inputs
     - Outputs
     - Outcomes

3. **Select evaluation methodology**
   - How to carry out research
   - Define sample

4. **Select research tools**
   - Surveys
   - Interviews
   - Content analysis
   - Case studies
   - Tracking mechanisms
   - Etc.

5. **Undertake research**
   - Canvas publics
   - Review existing data

6. **Analyze results**
   - Compilation of data
   - Analysis of data

7. **Present results**
   - Findings
   - Recommendations

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Exercise

Describe in one sentence, a project you would like to monitor and/or evaluate...

Research Tools

Most monitoring and evaluation research

tools are taken from the social sciences, e.g.

– Surveys

– Interviews

– Focus groups

– Panel Studies

– Observation

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Research Tools – Content Analysis

What is it?: systematic counting & analysis of units such as keywords, photos or events

What can it measure?: Outputs such as number of messages placed

When: usually during a project (monitoring tool)

Useful for: assessing interest in an issue, indicating level of adoption of a practice, determining past action on an issue

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Research Tools – Tracking Mechanisms

What is it?: A monitoring procedure documenting feedback received and changes observed

What can it measure?: Outputs: number of activities undertaken, Outcomes; changes to behavior

When: usually during a project (monitoring tool)

Useful for: tracking outputs (attendance levels), online behavior (purchases, registrations, referrals) and offline behavior (practices) and organizational changes (commitments, policies or practices)

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Content Analysis & Tracking Mechanisms
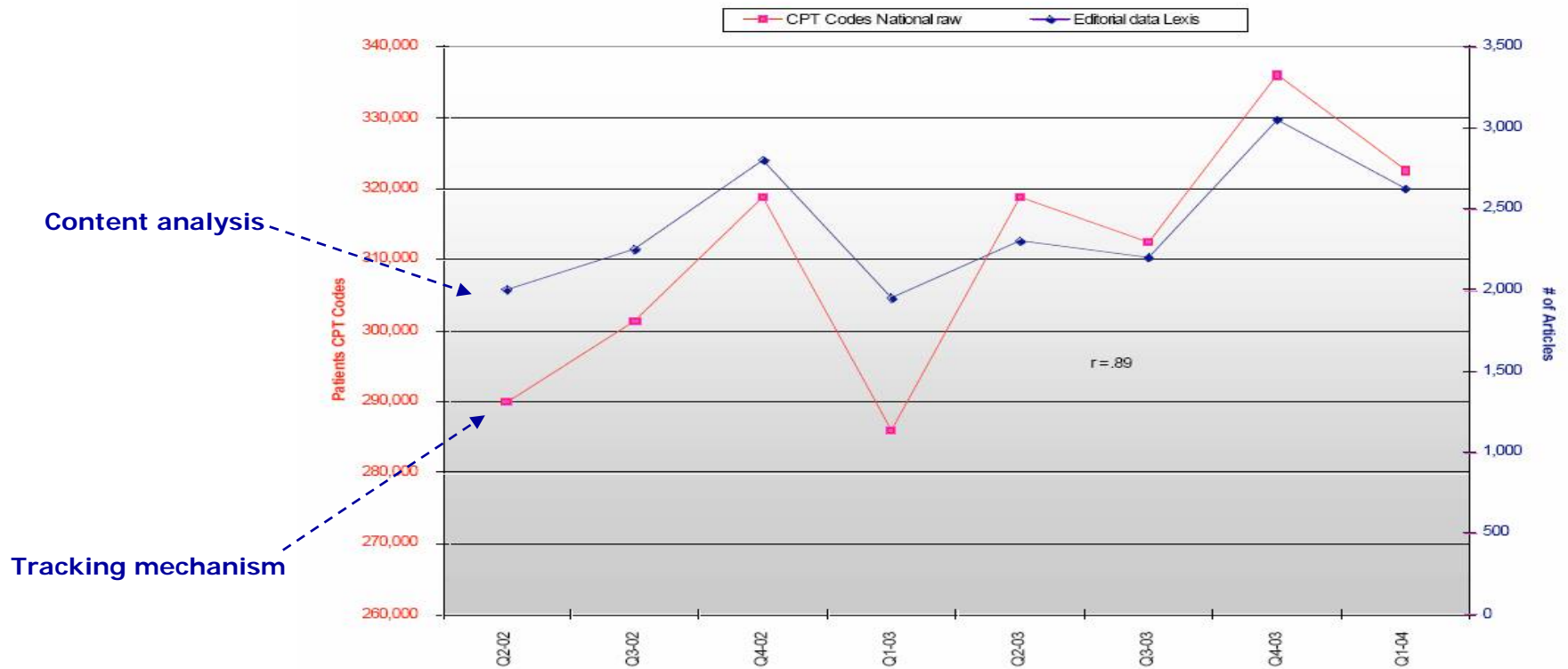
Source: "Exploring the Link Between Volume of Media Coverage and Business Outcomes", Instituteforpublicrelations.org

Research Tools – Case Studies

What is it?: the examination of an individual situation using different sources

What can it measure?: Outcomes; change to individual and organizational behavior

When: After a project

Useful for: providing in-depth examples of changes observed due to intervention of a project
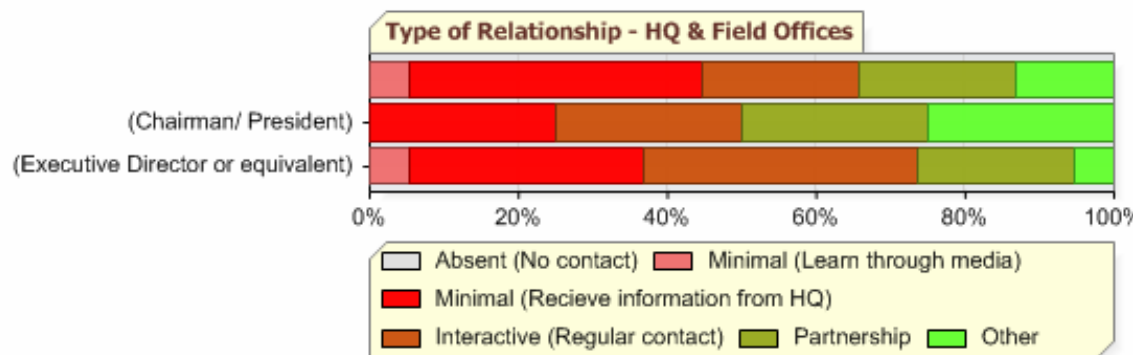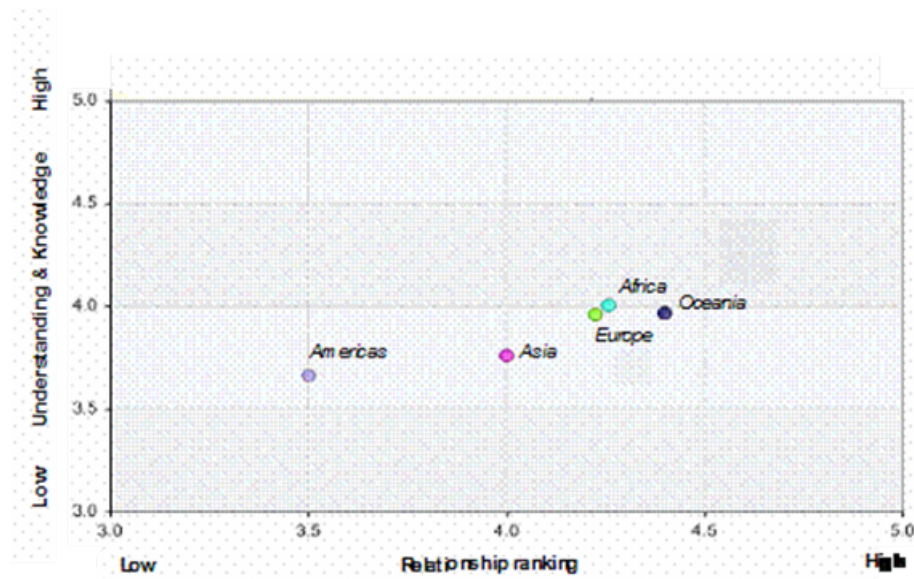
Research Tools – Relationship Measurement

What is it?: A way of measuring relationships with key publics/partners of a project or organization

What can it measure?: Outcomes; changes to nature and level of relationships

When: before, during or after a project

Useful for: assessing state of relationships between organization and partners/publics, perceived influence and importance of partners

Research Tools – Relationship Measurement

Type of Relationship - HQ & Field Offices

(Chairman/ President)
(Executive Director or equivalent)

Legend:
- Absent (No contact)
- Minimal (Learn through media)
- Minimal (Recieve information from HQ)
- Interactive (Regular contact)
- Partnership
- Other

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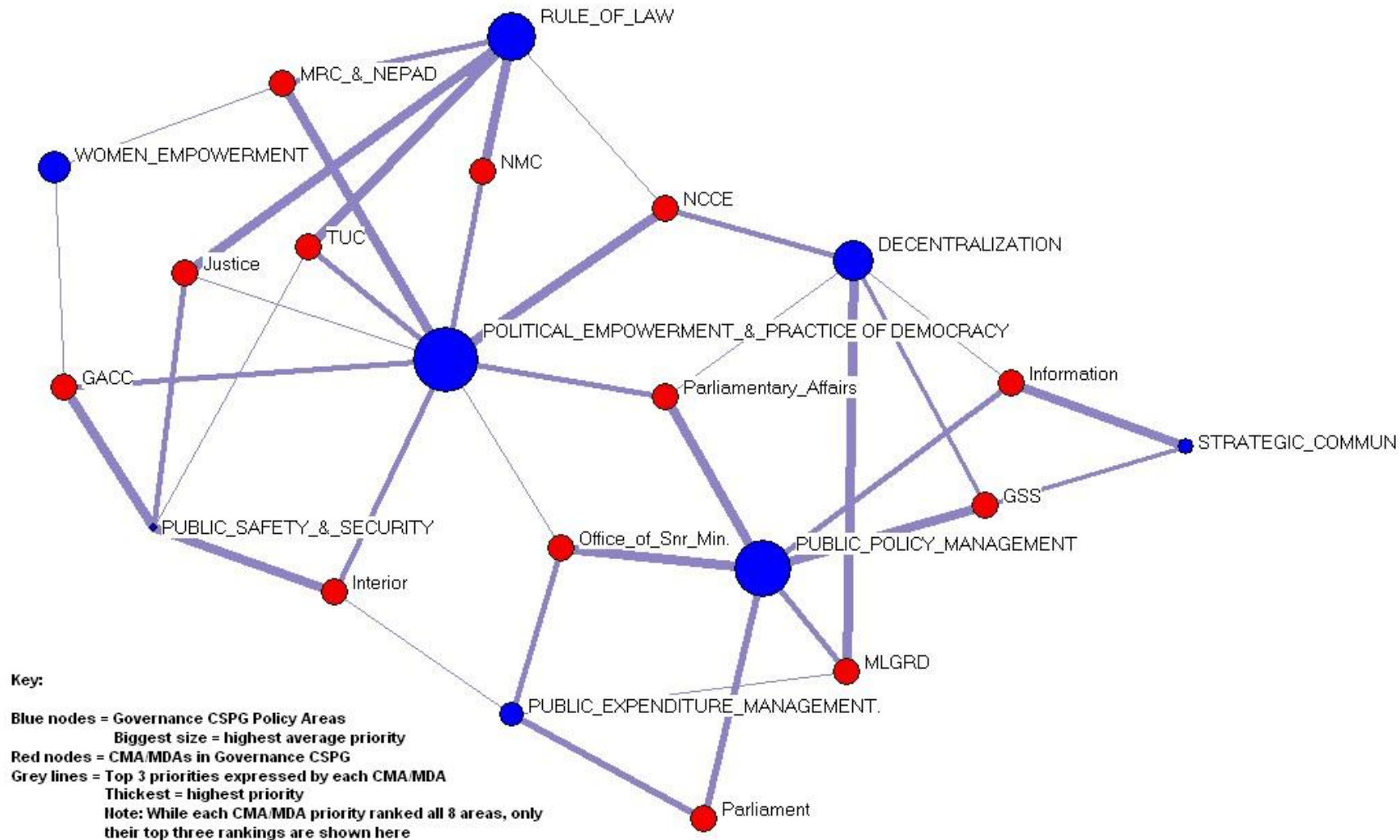
Research Tools – Network Mapping

What is it?: A way of representing and analysing networks of relationships

What can it measure?: Outcomes; nature and types of relationships

When: before or after a project

Useful for: assessing complex networks, looking at where common interest is found amongst network members, changes to networks over time

Research Tools – Network Mapping

Key:

Blue nodes = Governance CSPG Policy Areas
    Biggest size = highest average priority
Red nodes = CMA/MDAs in Governance CSPG
Grey lines = Top 3 priorities expressed by each CMA/MDA
    Thickest = highest priority
    Note: While each CMA/MDA priority ranked all 8 areas, only
    their top three rankings are shown here

Source: Rick Davies, www.mande.co.uk/networkmodels.htm

Exercise – Evaluation Framework

1. Break into groups

2. Select a project to monitor/evaluate

3. Design an evaluation framework for the
    project

4. Present the evaluation framework to the
    workshop

Exercise – Evaluation Framework

Objectives	Activities	Evaluation Indicators	Proposed evaluation tools & sources of data	Assumptions & Risks
The objective(s) of which this project is intended to achieve	The main activities that must be undertaken in order to achieve the outputs	*output:* Output indicators that measure the goods and services delivered by the project *Outcome:* Output indicators that measure the accomplishment of the set objectives	Evaluation & monitoring tools to measure the set output and outcome indicators Sources of data: people, events & processes	Assumptions & risks regarding the monitoring and evaluation of this project

Evaluation – Innovations/Trends

- Emergence of standards in monitoring/evaluation

- "Most Significant Change" method

- Outcome mapping

- Social media monitoring/evaluation (e.g. blog ROI)

- Linking RFID tags to network evaluation

- "instant" feedback for organizations on ideas, concepts, brands and positioning

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A Final Word…

One of the great mistakes is to judge policies and programs by their intentions rather than their results.

Milton Friedman (1912-2006), Economist

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