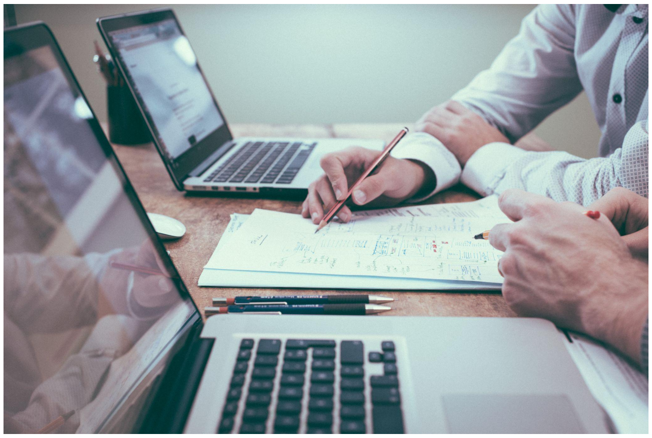
Enhance learning briefing 7

Practical ideas for better monitoring and evaluation

December 2022



Introduction:

This short report is based on feedback from 9 Enhance delivery partners. It contains insight and general suggestions from people who complete a range of monitoring returns from various funders. This learning may help funders and commissioners to design, implement or review their monitoring and evaluation requirements.

Monitoring and evaluation works better for delivery partners when they:

- Know exactly what specific data funders want, and why it is needed
- Have clear deadlines for the submission of monitoring returns
- Take part in a small-group induction session where they can ask questions
- Follow a straightforward monitoring process
- Use an online 'survey' to collect narrative and to upload attachments and a spreadsheet to collect numbers - both are easy to access and use
- Have access to funder-provided case study templates and data collection spreadsheets so that partners don't need to create their own or search through their organisation's Customer Relationship Management (CRM) system for data
- Understand the purpose of the monitoring or evaluation questions and see the link between questions and the intended programme outputs or outcomes
- Feel that the amount of data requested is the 'right amount' and proportionate to the size of the project, type of work they do and the amount of grant funding
- Know that if participants choose not to answer certain monitoring questions, or are unable to answer evaluation questions, this is acceptable to funders
- Are trusted to collect the data in a way that works for them
- Can complete paper forms during group or 1-2-1 sessions, instead of using a laptop

The advice that Enhance delivery partners would give to funders who are setting up new monitoring and evaluation processes is:

- Keep it simple, relevant and be clear about what data is required, and why
- Keep the questions the same for at least a year, but include one question that can be edited each quarter to collect new information on particular topics
- Include space to add extra detail that may not be requested in the standard monitoring questions
- When meeting participants for the first time, delivery partners need to concentrate on relationship building so they prefer that only essential questions are asked at the start. It helps if these are amalgamated into a single document, instead of having different forms for assessment, demographic data, evaluation questions etc.
- Brief stories (very short case studies of no more than 100 words) are easier to write than full case studies and can be written for a number of participants each quarter These brief stories are useful for presentations, reports and for engaging colleagues in the programme. Delivery partners are happy to turn selected brief stories into more detailed case studies on request by the funder, to help the funder gather relevant insight and learning into specific issues
- Funders should ask for service-specific data and talk to the frontline delivery partners to check that data collection is possible using their existing Customer Relationship Management systems - and alter the questions or provide data collection spreadsheets if not. One of our delivery partners told us that:
    - *"Organisations may well have some kind of database that they use to capture a certain amount of information. This will be for multiple purposes and might not be an exact fit to the monitoring information that is being asked for. We find we need time to make changes to this if being asked to capture something new. This usually means involving our database provider (external) and if the change is too complex, it generally takes two or three goes to get it right. And if the monitoring is for a short term funded project it can take up a disproportionate amount of time compared to the [amount and duration] of funding."*