

Firelight Newsflash! 16 June 2008 - Introducing Evaluation

INTRODUCING EVALUATION

These notes are designed for people in community-based organisations (CBOs) who are considering evaluating their work. This guide gives some brief answers to questions that people frequently ask.

WHAT IS AN EVALUATION?

An evaluation happens when people stop to try and find out:

- * whether the objectives of the work have been achieved
- * whether there have been any long-term changes
- * what lessons can be learned and whether there needs to be any changes to the design and direction of the work.

It is about reflecting on what has happened in order to influence the future.

WHAT IS THE DIFFERENCE BETWEEN MONITORING AND EVALUATION?

Monitoring is the on-going collection and analysis of information to find out whether a program or project is moving towards achieving its objectives. The information is collected throughout the life of the project.

An **evaluation**, however, is at one point in time, uses the monitoring information and may also question the overall direction of a program/project, as well as the objectives themselves.

Imagine a person setting off on a journey. During the journey they will check to see whether they are following their planned route, whether they are going at the right speed and whether they have enough resources (fuel and food) in order to arrive at their destination. This would be **monitoring** the journey. At the end or middle of the journey, however, they might stop to see how far they have come and ask whether they have chosen the right route to get to that place. At this point they might also ask whether they need to continue on the same route or whether circumstances have changed so they need to adjust the whole journey. This would be **evaluating** the journey.

A clear and organised system for collecting and analysing information is needed throughout the life of a project. This will enable monitoring to be done, providing information which can later be used for evaluation.

WHAT ARE THE BENEFITS OF AN EVALUATION?

An evaluation can:

- * help provide advice to the people making decisions and show a way forward
- * help people learn what is working best so that resources can be

used effectively

- * reveal the needs of the project, for instance training of staff
- * strengthen accountability – by showing to church leadership, funders and local people how the project is changing the situation
- * assess whether the original objectives are still worth trying to achieve
- * help people's ability to reflect and learn from the work of the project
- * help to improve monitoring
- * help to show whether the money, time and effort are worthwhile.

To summarise the above, an evaluation is undertaken for two main reasons: learning and accountability.

WHEN SHOULD THERE BE AN EVALUATION?

It is good to plan an evaluation to follow each important phase in the life of the project. This might be every two years or every five years, depending on the type of the work and when results are expected. An evaluation is also often undertaken at the end of a project. Sometimes an evaluation may be requested a few years after the project has finished – to look at the longer-term changes that have taken place. At the beginning of the project, therefore, it is always important to ask how it will be monitored and evaluated.

WHAT ARE THE DIFFERENT WAYS TO HOLD AN EVALUATION?

Most evaluations fall into one of the following three categories:

1) Self evaluation

This is when the staff or volunteers of an organization seek to evaluate their own work. It may be carried out by one member of the organisation or a team, or responsibility may be spread across the organisation. An external facilitator may be needed to support the process. People may wish to treat the results of self evaluations as confidential, or may use the findings as the basis of reports and proposals to donor agencies.

2) Joint evaluation

This type of evaluation is jointly planned by those managing the program or project and any donor(s). The person directly responsible for the evaluation may be in either the implementing agency or the funding agency. The advantage of a joint evaluation is that it can allow clear communication and understanding between the agencies about the progress of the project. The disadvantage is that it can sometimes be seen as a 'policing' exercise by the donor.

3) Participatory evaluation

There can be different levels of participation by beneficiaries in an evaluation.

- * Asking people for their views, perhaps through interviews or discussion groups.
- * Involvement of beneficiaries in the design of the evaluation, for example asking

them to help define key questions and criteria for evaluation.

- * Involvement of beneficiaries in the design, and also in carrying out parts of the evaluation, for instance doing interviews.
- * Handing over responsibility for the evaluation to the beneficiaries.

Participatory evaluation has many advantages, but it can only work well when there is the same level of participation throughout the life of the project. In participatory evaluation, self-accountability is highly valued and all aspects of the evaluation, including the data, are understandable and meaningful to participants so that they can come up with their own conclusions about what changes have occurred.

SHOULD WE USE EXTERNAL PEOPLE?

In any of the above approaches to evaluation, it may be decided to recruit an external person or team to undertake or facilitate the evaluation. External people may be consultants, researchers or from other organisations.

Advantages of Using External People

- * They can bring new ideas, new perspectives and specialist skills.
- * They may be seen to be more 'objective' than insiders.
- * They can have the ability to compare the situation with other similar projects.
- * Donor requirements sometimes include the need for external people.
- * It can be easier for external people to highlight difficult issues (eg: gender sensitivity).
- * Staff/beneficiaries may feel more able to voice their opinions to external people.
- * There is less risk of an 'atmosphere of blame' than when using internal people.
- * It is possible to select people with proven evaluation or facilitation skills.

Disadvantages of Using External People

- * It takes time and effort to recruit and manage consultants.
- * External people may lack knowledge of the organisation, project or local culture.
- * External people cannot provide support to the follow up of recommendations if recruited for a short period of time.
- * Sometimes it is hard to find the right people.
- * Consultants can be expensive.
- * The evaluating skills of staff and beneficiaries may not be developed.
- * Staff/beneficiaries may not be committed to recommendations made.
- * The presence of external people can be threatening.

WHAT DO WE NEED TO DO NOW IN ORDER TO RUN AN EFFECTIVE EVALUATION LATER?

- * Gain a clear idea of how the project will be monitored and evaluated, and then think about who will be responsible for making the evaluation happen.
- * Make sure there are clear program or project aims and objectives against which

progress can be measured.

* Think about whether a baseline is needed which shows the situation before the start of the project.

* Make sure there are clear and reliable 'indicators' to help measure progress.

* Keep documents and data, and record people's views in a way that is easy to find again.

* Think about the cost of the evaluation in time and money and make sure it is included in budget planning.

Taken from Tearfund's Guidelines on Assessment: Introducing Evaluation, which is attached for more information. Additional resources from Tearfund's ROOTS series (Resourcing Organisations with Opportunities for Transformation and Sharing) can be found at: <http://tilz.tearfund.org/Publications/ROOTS/>

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