



Monitoring and evaluation



What is monitoring and evaluation and why is it important?

Monitoring and evaluation is a common term you might see in relation to funding, accountability or planning for your social enterprise.

Monitoring is simply about regularly collecting and recording information in order to check progress against plans or to help you answer questions about your organisation.

Evaluation builds on monitoring and provides an assessment of the effectiveness and impact of a particular activity or project. Many organisations have a mission and aims, and they need to keep track of the activities they carry out to meet their mission. You may also need to keep track of easily countable things, such as the number of qualifications obtained or products sold. This only begins to tell the full story of your impact. When you evaluate, you will likely use monitoring information but will also collect further information to capture the full story.

Effective monitoring and evaluation will help your organisation to provide services of the highest possible quality, and embody the highest standards of integrity, credibility and accountability. It will make sure that you are working with the greatest possible effectiveness and efficiency, that you will provide value for money and, above all, that the work you do will make a real difference.

Monitoring and evaluation is crucial for funding, investment, talking to the people who matter to your organisation about your work and for contracts. It can be used for publicity and marketing purposes and as information for compliance (e.g. legal requirements).

How do you monitor and evaluate?

There are many methods, approaches and tools to help you monitor and evaluate your work and social enterprise. However, the Charities Evaluation Service suggests that there are basic steps that describe what needs to be done:

- Step 1** What are your aims?
- Step 2** What are your objectives?
- Step 3** How do you know? What are your indicators or 'ways of knowing' you have succeeded?
- Step 4** Monitoring - how well are you doing?
- Step 5** Evaluation - what changes have you made?

An example of putting monitoring and evaluation into practice

The School for Social Entrepreneurs (SSE) exists to help create successful social enterprises. It does this by providing a learning programme to existing or potential social entrepreneurs with a high element of peer to peer learning and learning by example.

SSE monitored data on its graduates, known as Fellows, and used a number of different ways to evaluate the impact of training that the Fellows received. This included 'distance traveled' measures. For this, they asked their Fellows to plot on a scale of 1-10 where they saw themselves and their project in key areas, such as networks and partnerships and looking after and developing themselves, after graduating from the course. They also collected information such as changes in income (turnover) and changes in employment created or volunteering opportunities created in their social enterprises.

All of the monitoring and evaluation was internally generated. However, it was considered that there may have been a bias from the Fellows towards giving positive responses as they were reporting back directly to the SSE. Also the evaluation was not able to identify other long term effects of the support received from SSE.

SSE therefore commissioned an independent organisation in 2006 to evaluate the impact it had on its Fellows since its inception in 1998. Using a variety of different methods the evaluating organisation, the New Economics Foundation (NEF), followed the last three steps explained above. SSE was comfortable with its aims and objectives so these steps were left out.

How the New Economics Foundation helped the SSE

Using similar methodology to the Charities Evaluation Service, steps 1 and 2 (aims and objectives) were identified using the SSE vision and mission statement. The SSE aims were identified as “to increase social benefit” and their objectives were identified as “running practical learning programmes to help develop the individual entrepreneur and their organisation simultaneously.”

The evaluation needed to look at whether these aims and objectives were being met and if so how effectively.

For **Step 3** (How do you know? What are your indicators or ‘ways of knowing’ you have succeeded?) it had to be agreed what was being measured. The indicators that were determined included:

Organisational development and changes in social benefit

- Sustainability of the social enterprises started by the Fellows.
- Changes in income of the social enterprises.
- Changes in employment opportunities within the social enterprise.

Personal development of the social entrepreneur/Fellow

- Changes in confidence.

NEF examined how well SSE had performed (**Step 4** - Monitoring - how well are you doing?) against the above indicators. They then reported about what changes had been brought about on the Fellows and their organisations as a result of the support from SSE (**Step 5** - Evaluation - what changes have you made?).

The results were very positive and revealed numerous changes that SSE had not been aware of previously. These included:

- Greater sustainability of their Fellows’ social enterprises than the average for other enterprise start-ups.
- Better than average employment opportunities created.

NEF was therefore able to verify that SSE was meeting its aims and objectives.

SSE has subsequently been able to use this independently verified evaluation to recruit more students and access greater support for its training programme. Details of the full case study can be found in our section on further information.

Things to look out for with monitoring and evaluation

Language can be quite confusing. The term ‘measurement and evaluation’ is often used in a very similar way to ‘monitoring and evaluation’. Similarly, in the social enterprise sector, people may refer to ‘proving and improving’, ‘social accounting’, ‘triple bottom line’ and ‘impact measurement.’

Remember that terms such as aims and objectives can be confusing and are often interchangeable. “Aims” are equivalent to the vision statement and “Objectives” are equivalent to the mission statement.

However, keep in mind that ultimately all these terms refer to ways of understanding value and the truth about what your organisation does.

Further information

Read the full **School for Social Entrepreneurs monitoring and evaluation case study:**
www.sse.org.uk/about.php?sub=OUTCOMESIMPACT

Read our guide on Understanding and Measuring Social Impact:
www.blondon.com/socialenterprise/Setting-up.html

Visit the Charities Evaluation Service website for information and resources on monitoring and evaluation:
www.ces-vol.org.uk/index.cfm?pg=40

View an example of how an organisation would set their aims and objectives, find indicators and monitor and evaluate against them:
www.proveandimprove.org/new/getst/TheSurfCentre.php

Visit the New Economics Foundation (NEF) publication and website, 'Proving and Improving: a quality and impact toolkit for social enterprise':
www.proveandimprove.org/new/getst/index.php

Download the NEF booklet, 'Tools for You' to compare various approaches to monitoring and evaluation:
www.neweconomics.org/gen/z_sys_PublicationDetail.aspx?pid=287

View the School for Social Entrepreneurs' longitudinal evaluation:
www.sse.org.uk/about.php?sub=OUTCOMESIMPACT

Read our guide on Vision, Mission and Values:
www.blondon.com/SocialEnterprise/SettingUp/Settingobjectives/Visionmissionandvalues.aspx