Guidelines to Assist Projects in the Development of Project Aims, Objectives and Targets

SCP

Programme for Educational Opportunity

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Introduction

The School Completion Programme (SCP) "Guidelines on the Implementation of Local Review" were sent to projects in 2005 to assist in the task of establishing local review and evaluation procedures. The guidelines include sample questionnaires to ascertain views of SCP with and by relevant stakeholders including targeted young people, parents, teachers and external agencies. This next set of guidelines also focus on the area of review and evaluation. These guidelines have been developed to assist local projects in the task of setting project aims, objectives, indicators, targets and outcomes. Projects are required to set targets as per the SCP Retention Plan.

In order to assist local projects in the task of setting project aims, objectives, indicators, targets and outcomes, the SCP Support Service has received permission to circulate the following publications:

- Handbook from the Carmichael Centre course on Monitoring and Evaluation.
- 'First Steps in Monitoring and Evaluation' Charities Evaluation Services (2002).[1]

These two publications clearly set out processes for developing aims, objectives and performance indicators and develop further the links between these processes and project monitoring and evaluation.

Measuring national targets

The most recent Retention Plan sent to projects includes the following paragraph on target setting:

"Projects are asked to set targets at a local level in order to measure project outcomes. Projects should be mindful of two targets set at national level to measure improvements in transfer between primary and post-primary and retention to Junior Certificate:

- Percentage of pupils in schools participating in SCP who transfer from Primary to Post-Primary.
- Percentage of pupils in schools participating in SCP who sit the Junior Certificate and comply with the requirements of the Education (Welfare) Act 2000.

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[1] Although both publications specifically relate to community and voluntary groups, the principles of evaluation and review documented also apply to projects participating in the School Completion Programme.

Projects are encouraged to set other relevant local targets. Projects will be asked how local targets were met in the annual progress report. Projects are also encouraged to discuss the outcomes of target setting at the annual Review Day".

Projects report on the two quantitative targets (percentage of pupils in schools participating in SCP who transfer from Primary to Post-Primary and the percentage of pupils in schools participating in SCP who sit the Junior Certificate and comply with the requirements of the Education (Welfare) Act 2000) in the annual progress report. To ensure the accuracy of this data, projects need to develop local systems to track the progression of targeted young people at each educational stage and liaise with the relevant stakeholders (e.g. Principals, Home School Community Liaison teachers, Guidance Counsellors, Education Welfare Officers, Visiting Teacher for Travellers etc.) to verify data.

While SCP projects track the progress of targeted young people at risk of early school leaving through all stages of the primary and post-primary education system, the two national targets relate to two educational milestones: transfer between primary and post-primary and retention to Junior Certificate. In the annual progress report, Co-ordinators must provide data on all targeted young people who fail to transfer between primary and post-primary i.e. the targeted young people who transfer out of the SCP cluster (e.g. relocated, different school, residential care, nothing in particular etc.)[2].

Projects must also supply accurate data on the number of targeted young people who leave the project before completion of the Junior Certificate. Projects should keep up-to-date data on the progress of targeted young people through the education system and whether they reach education milestones such as the Junior Certificate. Co-ordinators should liaise with relevant stakeholders to ensure records of early school leaving are accurate. Again, in the annual progress report, Co-ordinators must record the number of targeted young people who leave school before completion of Junior Certificate and where possible, the destination of the targeted young person when they leave the formal education system.

Measuring local targets

Projects will be asked to state their aims, objectives and targets. Local targets can be defined as targets set by the local SCP project to measure the impact of the programme on the target group. Projects at local level can choose to set targets in any area they deem appropriate in line with locally agreed aims and objectives.

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[2] The next reporting period '1st September 2007 to 31st August 2008' will record the number of targeted young people who did not return to school as of 1st September 2007 and targeted young people who left during the school year (up to June 2008).

Example 1 outlines a process for setting a target at local level

Example 1

One of the project's aims might be:
"To improve the in-school attendance of the SCP targeted group"

One of the project's objectives might be:
To provide support to a targeted young person to improve his or her in-school attendance"

The target might be:
"To improve the in-school attendance of the SCP targeted group by 10% in the current year"

The target might be measured by:

- Establishing a baseline: Choose an academic period, for example, 2007 / 2008
    - Knowing how many young people the project has targeted at the start of the school year (as well as accounting for fluctuations in the target list during the school year)
    - Knowing the attendance patterns of targeted young people throughout the school year
    - Monitoring the school roll book throughout the school year
    - Viewing the records of the Attendance Secretary (if available)
    - Putting in place an attendance tracking database
    - Putting in place a system to monitor and record the attendance of targeted young people at SCP supports.

If the in-school attendance of SCP targeted young people improved by 10% based on the monitored attendance patterns over the chosen reporting period, the SCP target would have been met.

Key considerations in target-setting

1. Targets set by projects should be SMART:

   S Specific

   M Measurable

   A Attainable

   R Realistic

   T Tangible

2. Targets set by projects should also specifically relate to the stated aims and objectives of the project. The targets set should flow from the agreed aims and objectives and systems to measure progress of targets should be established before targets are set.

3. Other relevant areas for local target-setting could include:
   - Attendance at SCP supports
   - Behaviour (changes in targeted young person's behaviour at SCP supports)
   - Personal and social development (changes in targeted young person's self-esteem, confidence, happiness etc.[3])
   - Academic achievement (e.g. literacy and numeracy, exam grades)
   - Client satisfaction with supports being offered to them
   - Involvement with external agencies

Projects should adhere to the guidelines in the attached booklet from the Charities Evaluation Services, which state that projects should be prudent in setting output and outcome indicators. Projects should set a small number of indicators that are particularly relevant to the project's aims and objectives.

Projects will be asked to state their aims, objectives and targets in the annual progress report. Projects will also be asked to report on progress towards targets set in that academic period and the methodologies adopted to measure the targets set by the project.

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[3] Measuring changes in the behaviour of targeted young people under the headings self-esteem, confidence etc. is particularly difficult. Any method adopted by local projects to measure such changes in behaviour will be subjective and mainly qualitative. The publication attached from the Charities Evaluation Services outline some processes for measuring self-esteem.

Appendix 1: Handbook from the Carmichael Centre on Monitoring and Evaluation

Definitions

Monitoring

Monitoring is the **on-going checking of progress** against a plan through routine, systematic collection and review of information. It is concerned with noticing differences over time and with providing a regular check on what we are doing against what we are supposed to be doing. It can answer questions such as: *Is the number of people coming to our centre more or less than at the same time last year?* Or *How much have we spent so far this year, and is this in line with our budget?*

Evaluation

Evaluation is concerned with **making a judgement** about the merit of an activity and measuring it against specific criteria. It is concerned with an assessment of the effects of an activity, and compares these with the goals which the activity was intended to achieve. It can answer questions such as:
How well are we meeting the needs of our users? Or *Are people more aware than before about the environment (or their welfare rights, or whatever)?*

Carrying out an evaluation will require information that is gathered through the monitoring process. It may also need additional information.

Aims

The changes you are trying to achieve for your members, clients or community.

Objectives

The planned activities that you will carry out to achieve your aims.

Inputs

Inputs are the **human and material resources** used to plan and carry out a project or service in order to achieve its objectives. Inputs can be volunteer and staff time, premises, equipment, funds etc.

Process

Process is how things are organised in order to achieve the objectives of the organisation. Process can mean how the organisation is managed, how staff or volunteers are supported and supervised, how the organisation communicates internally and externally, how the budget is controlled, etc.

Outputs

Outputs are the detailed activities or services that are produced by the organisation. This could include things such as the number of youth club places, number of meals provided, number of information sessions held, number of helpline calls taken, number of fact sheets sent out, etc

Outcomes

Outcomes are the changes that take place as a result of the outputs. In other words, what effect did the outputs have? What changes have come about as a result of the activity? Did people find the service useful? Did they want other things that were not provided?

Output Indicators

Output indicators are a type of performance indicator and assess progress towards meeting objectives.

Outcomes Indicators

These are things you can use to assess whether the expected outcomes is occurring. Outcome indicators assess progress towards meeting aims. Outcome indicators are a type of performance indicator, and can be qualitative or quantitative.

The Carmichael Centre Cake Model

Aims
To improve morale of Carmichael Centre groups

Objectives
To provide cakes for all Carmichael Centre members every Friday morning

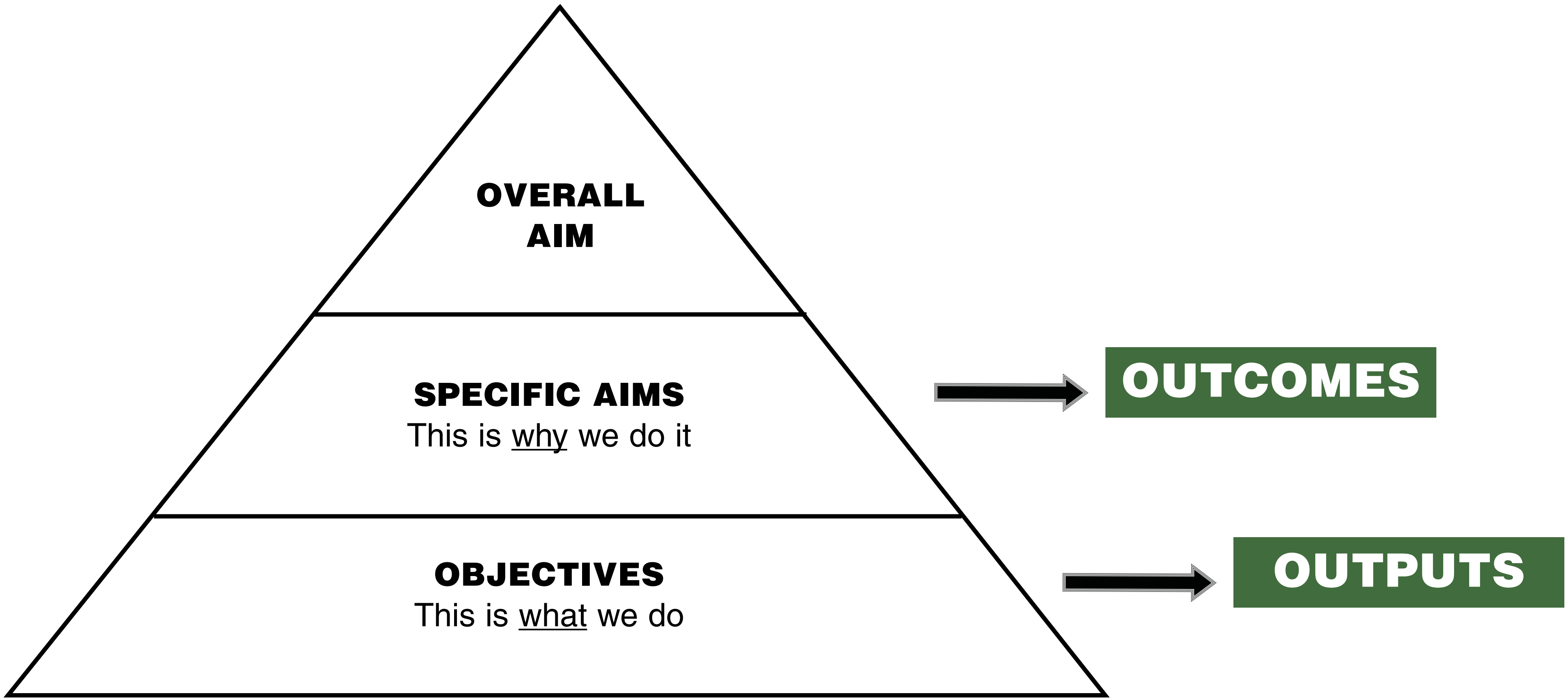
Inputs
Staff / volunteer time
Skills and knowledge
Budgets / finance
Equipment
Ingredients

Process
A social committee is established to recruit volunteers to bake the cakes and to clean and wash up. Four volunteers are required every Friday morning. The cakes are provided every Friday morning between 9 and 11. Cake is provided free to everyone who turns up

Outputs
The coffee mornings
The cakes
Satisfaction with the cakes

Outcomes
Increased levels of social interaction
Increased networking and information sharing

Aims & Objectives



LANGUAGE

AIMS

Aims describe the changes for the client, user or community and the following types of words are normally used to describe them:

To enable ...
To improve ...
To increase ...
To reduce ...
To empower ...

OBJECTIVES

Objectives describe the activities that you do to achieve your aims and the following types of words are normally used to to describe them:

To provide...
To support...
To offer...
To run ...
To set-up...

Possible Output Indicators

1. Level of Service	2. Who uses your service	3. How the service is used
• How many people use your service • How many courses you provide • How many queries you deal with	• Age • Gender • Geographical location • Nationality • How they heard about you	• Time of use • Duration of use • Regularity of use • Which parts of the service are used most regularly

Information Collection Methods for Outputs

1. What to count

Once you have identified a number of possible output indicators it is important to choose which indicators you actually want to use. It is not practical to collect information on all the possible indicators so you have to be selective. Before making a choice think about your stakeholders (board or committee members, clients and funders) and the sort of information they might want. It is worth discussing their information needs before setting up your monitoring system. Otherwise you can end up collecting information for reports that no-one reads.

You will also need to think about your own information needs in terms of managing projects or services. Your monitoring should give you enough information to tell you who is using your service and how, what is working and what is not working, and help you plan for the future.

How to count

Having decided what information you want to gather, you must choose your methodology.

Think about your existing information systems and how you can gather information as close to the event as possible and in a way that integrates with existing systems.

Do your existing systems give you all the information you need once you collate it on a regular basis?

Do you need to add questions to existing forms?

Do you need to create new recording forms or systems? If you are creating new forms use tick boxes wherever possible and create the categories that make sense for you.

Possible methods include:

- Register taken at beginning of a session showing how many people attended
- Booking form giving information about people or organisations booking for an activity
- Diary which records how many sessions were run in one year
- Referral form which records information about people using the service
- Record sheet which monitors the use of a drop-in service
- Feedback sheet to record user satisfaction

Possible Outcome Indicators

Outcome indicators show how far an organisation has come in achieving the outcomes that it hoped for. It is often difficult to find indicators that are easily measurable. It helps to remember that you are not necessarily looking for proof, but for indicators or clues on which you can base your judgements. Here are some examples:

- ### Local Women's Community Project

Outcomes: To increase self-confidence of women within the group

Indicators:
- Range of new activities undertaken by the women outside the home
- Level of involvement in running of the centre
- Women's own views on their self-confidence

- Project for young unemployed people

Outcomes: To increase employment opportunities for young unemployed people

Indicators:
- Increase in self-confidence
- Development of skills
- Increase in ability to communicate
- Number of applications made
- Number of interviews attended
- Number of job placements

- Information service about specific medical conditions

Outcome: To improve the way that people with specific medical conditions manage the condition

Indicators:
- Level of knowledge about condition
- Change in diet
- Change in level of exercise taken

- Hostel for homeless people

Outcome: To help residents cope successfully with independent living

Indicators: 'Baseline' skills and needs identified for each client and progress is measured relative to the baseline

- Local advice centre

Outcome: To increase quality of life for local residents through access to financial advice

Indicators:
- Number of clients accessing social welfare benefits
- Total income from social welfare benefits
- Number of clients in debt
- Level of debt

Information Collection Methods for Outcomes

1. Which outcomes

As with outputs, it is probably not feasible to measure all the possible outcomes of your project or service. In order to prioritise the outcomes that you need to collect data on, think about the outcomes that

- reveal most about your progress
- are important to your funders and your board
- are practical to assess

2. Which information collection methods

- Output data (eg client case records can give an indication of a change taking place over time)
- Questionnaires and surveys
- Interviews
- Focus groups
- Case studies
- Participatory Learning and Action
- Observation

Information Collection Methods Pro's & Con's

Method	Overall Purpose	Advantages	Challenges
questionnaires, surveys, checklists	when need to quickly and/or easily get lots of information from people in a non threatening way	- can complete anonymously - inexpensive to administer - easy to compare and analyze - administer to many people - can get lots of data - many sample questionnaires already exist	- might not get careful feedback - wording can bias client's responses - are impersonal - in surveys, may need sampling expert - doesn't get full story
interviews	when want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires	- get full range and depth of information - develops relationship with client - can be flexible with client	- can take much time - can be hard to analyze and compare - can be costly - interviewer can bias client's responses
documentation review	when want impression of how program operates without interrupting the program; is from review of applications, finances, memos, minutes, etc.	- get comprehensive and historical information - doesn't interrupt program or client's routine in program - information already exists - few biases about information	- often takes much time - info may be incomplete - need to be quite clear about what looking for - not flexible means to get data; data restricted to what already exists

Taken from Carter McNamara, www.mapnp.org

Method	Overall Purpose	Advantages	Challenges
Observation	to gather accurate information about how a program actually operates, particularly about processes	- view operations of a program as they are actually occurring - can adapt to events as they occur	- can be difficult to interpret seen behaviours - can be complex to categorize observations - can influence behaviours of program participants - can be expensive
focus groups	explore a topic in depth through group discussion, e.g., about reactions to an experience or suggestion, understanding common complaints, etc.; useful in evaluation and marketing	- quickly and reliably get common impressions - can be efficient way to get much range and depth of information in short time - can convey key information about programs	- can be hard to analyze responses - need good facilitator for safety and closure - difficult to schedule 6-8 people together
case studies	to fully understand or depict client's experiences in a program, and conduct comprehensive examination through cross comparison of cases	- fully depicts client's experience in program input, process and results - powerful means to portray program to outsiders	- usually quite time consuming to collect, organize and describe - represents depth of information, rather than breadth

Taken from Carter McNamara, www.mapnp.org

Evaluation Framework

Aims	*Outcomes*	*Outcome Indicators*	*Information Collection Methods*	*When and by whom*	*Reporting Methods*
Aim One					
Aim Two					

Objectives	*Outputs*	*Outcome Indicators*	*Information Collection Methods*	*When and by whom*	*Reporting Methods*
Objective One					
Objective Two					

Five Steps to Self Evaluation

STEP ONE: Set and clarify aims and objectives

STEP TWO: Define outcomes, outputs and indicators

STEP THREE: Identify and draft information collection methods

STEP FOUR: Collect the Information

STEP FIVE: Present and use the results

Writing the Report

Sample Outline

- Title page – report title, authors and date
- Contents page – chapter and page numbers
- Summary – a few paragraphs summarising the report, including key findings, strengths and weaknesses of the project and recommendations for the future.
- Background Information on the project – a brief history including the key stages of development, aims and objectives, activities and resources
- Information on the evaluation process – the purpose of the evaluation and the methods used for collecting information
- Findings – the presentation of the information and data collected both in quantitative terms (the numbers and percentages) and qualitative (perceptions of the stakeholders)
- Analysis and conclusions – Examining all of the factors that could have lead to the findings, an assessment to what degree the project has achieved what it set out to do and a review of strengths and weaknesses
- Recommendations – key actions to be taken that would strengthen or improve the project
- Appendices – questionnaires, interviews etc

Useful Publications

- *Practical Monitoring and Evaluation,* Charities Evaluation Services
- Excellent guide with useful forms and templates

- *A Guide to Self Evaluation* by Jane Clarke, Combat Poverty Agency
- A brief guide to evaluation

- *Monitoring and Evaluation made easy* by Anne Connor, HMSO
- Useful examples for groups providing direct care to older people, children and families

- *How well are we doing?* By Charities Evaluation Services
- Step by step guide based on the example of a women's community project

- A series of discussion papers entitled: *The purpose of evaluation, Different ways of seeing evaluation, Self-evaluation, Involving users in evaluation, Performance indicators: use and misuse, Using evaluation to explore policy, Outcome monitoring* by Charities Evaluation Services
- Include case studies from wide variety of organisations

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Appendix 2

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helping you do better what you do best

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first steps in monitoring and evaluation

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first steps in monitoring and evaluation

Charities Evaluation Services (CES) has worked since 1990 with a wide variety of voluntary organisations and their funders, providing training, advice and support to promote quality and accessible monitoring and evaluation practice.

If you have any queries about developing monitoring and evaluation in your own project, you can get free advice from CES.

Phone 020 7713 5722 or
email enquiries@ces-vol.org.uk

Training is also available. Details are provided on page 24.

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inside this booklet

introduction

Voluntary organisations want to show that they are working to high standards and that they really are making a difference. They are also under increasing pressure from funders and the government to demonstrate how well they are doing and what works. But organisations may be put off evaluation by a belief that it is a job for experts, or by monitoring and evaluation jargon. People may also be worried about the risk of adding to their workload.

Monitoring and evaluation both need commitment, planning and some investment of time, but this booklet will show you that you can do them with the resources you already have. It should also reassure you that you probably already have many of the skills you need.

this booklet

This booklet has been developed particularly for small voluntary organisations and projects with little or no experience of monitoring and evaluation. The term 'project' is used throughout, for simplicity, but the principles described can be applied to any voluntary or community organisation.

The booklet uses everyday language and gives you a practical, five-step, easy-to-follow approach to evaluating your own project. We will use a family centre as an example to demonstrate each step. If you apply the five steps to your project, you will gain fresh insight into what you do. This will strengthen the whole project and improve its performance.

what is monitoring and evaluation?

Monitoring is about collecting information that will help you answer questions about your project. It is important that this information is collected in a planned, organised and routine way. You can use the information you gather to report on your project and to help you evaluate.

Evaluation is about using monitoring and other information you collect to make judgements about your project. It is also about using the information to make changes and improvements.

Why should you evaluate?

Monitoring and evaluation are important for two main reasons.

For learning and development

Monitoring and evaluating your services will help you assess how well you are doing and help you do it 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 others that you are effective

Funders and other sponsors want to know whether a project has spent its money in the right way. There is pressure from funders to provide them with 'proof' of success. Many projects have to respond to this demand in order to survive.

What is self-evaluation?

When an organisation uses its own people and their skills to carry out evaluation, this is known as self-evaluation. Monitoring and evaluation is built into the everyday activities of the project so that it becomes part of what you do. This booklet shows you the first steps to self-evaluation.

the five-step approach to monitoring and evaluation

Voluntary organisations have to be clear about what they are trying to achieve and need to develop specific aims and objectives. This is increasingly important for funders, other agencies and for service users. There are many approaches to evaluation. The approach this booklet describes is a model of self-evaluation that recognises this emphasis on aims and objectives.

Each of the five steps in the approach is coded using a different colour.

Step 1
What are your aims?

Your aims are the changes you are trying to achieve in the main group or groups you work with.

Step 2
What are your objectives?

Your objectives are the activities you carry out to achieve your aims. In other words, how will you bring about these changes?

Step 3
What are your performance indicators?

These are the things you check to see how well your project is doing. In other words, how will you know you are bringing about a change?

Step 4
Monitoring – how well are you doing?

You need to monitor to find out whether you are achieving your aims and objectives. Monitoring is the routine and systematic collection of information. This will tell you about your activities and whether the project is making a difference.

Step 5
Evaluation – what change have you made?

You evaluate, that is, you consider all the information you have collected and make a judgement about your project.

We will work through each of these steps in turn.

step 1
what are your aims?

It is useful to review your project's aims and objectives when you start your self-evaluation, to make sure they are clear and appropriate. It is also important to distinguish clearly between your aims and your objectives.

Aims describe the changes you want to see in your target group.

What is a target group? This term refers to the main group or groups you are working with and the people your service is intended for. For example, the target group of the family centre is the children and parents identified as most needing and likely to benefit from its activities.

The aims of the family centre describe the changes it wants for those children and parents.

It is useful to break aims down into two different parts. We can call the first part an overall aim. The **overall aim** of the family centre is '*to improve the lives of the children who use the centre*'. This describes in broad, general terms the change the family centre wants to see in its target group. Some organisations call their overall aim a 'mission statement'.

The overall aim is likely to be too broad a statement to allow you to plan your work in detail or to provide guidance on what you might monitor and evaluate. It is helpful, therefore, to break the overall aim down into **specific aims**. These are more precise statements about different aspects of your overall aim.

What does the family centre mean by 'to improve the lives of the children?' It means three specific things:

- to improve the parenting skills of the parents using the centre
- to increase children's self-esteem
- to help parents give each other support.

You can now check more easily how you are doing by monitoring and evaluating in relation to each separate aim. You may wish to break your overall aim down into more than three statements. Some projects have four or five specific aims.

checklist

It is helpful to keep the following points in mind when agreeing your aims:

- **Use language that will be helpful.**
  People tend to use verbs that describe change when setting their aims, such as *to increase*, *to promote*, *to improve*, *to reduce*, *to enable* or *to develop*.
- **Be clear about your target group.**
  Who are you working with? Which group or groups will change or benefit as a result of the project?
- **Be clear about the geographical area you will work in.**
- **Make sure everyone in the project is clear about its aims.**
  Does everyone understand what each aim means? Try to involve as many people as possible throughout the project when you set your aims.

Remember that it is important to take time to discuss and decide your aims. You will find it more difficult to set the right objectives and to evaluate the project if your aims are unclear. Make sure you cover all the points in the checklist before you go on to the next step.

Once you have agreed on the change you want to bring about, the next step is to think about how you are going to do this – by setting your *objectives*.

step 2
what are your objectives?

Objectives are the practical activities you carry out to bring about a change in your target group – that is, to achieve your aims.

The family centre has four objectives:

- to provide workshops, information and advice on parenting skills
- to provide opportunities for play, drama and dancing
- to run a drop-in centre with a play area
- to organise outings for parents.

These were decided on by looking at each aim in turn. They then discussed: 'What do we need to do as an organisation to achieve this aim?'

The objectives relate to the family centre's three specific aims in the following way:

Specific aim one	Objectives
To improve the parenting skills of the parents using the centre	So they: ■ provide workshops, information and advice on parenting skills ■ run a drop-in centre ■ organise outings for parents.
Specific aim two	**Objectives**
To increase children's self-esteem	So they: ■ provide opportunities for play, drama and dancing ■ run a drop-in centre with a play area.
Specific aim three	**Objectives**
To help parents give each other support	So they: ■ provide workshops, information and advice on parenting skills ■ organise outings for parents.

There is a direct link between each aim and its objectives. In order to achieve some aims, it may be necessary to carry out several different activities. Therefore, each aim may have more than one objective and some objectives may relate to more than one aim.

checklist

It is helpful to keep the following points in mind when setting your objectives:

- **Use language that will be helpful.**
  People tend to use verbs which describe action when setting their objectives, such as *to organise*, *to produce*, *to conduct*, *to set up*, *to run* or *to provide*.

  Using different types of words for your aims and objectives will help you keep them distinct from one another.

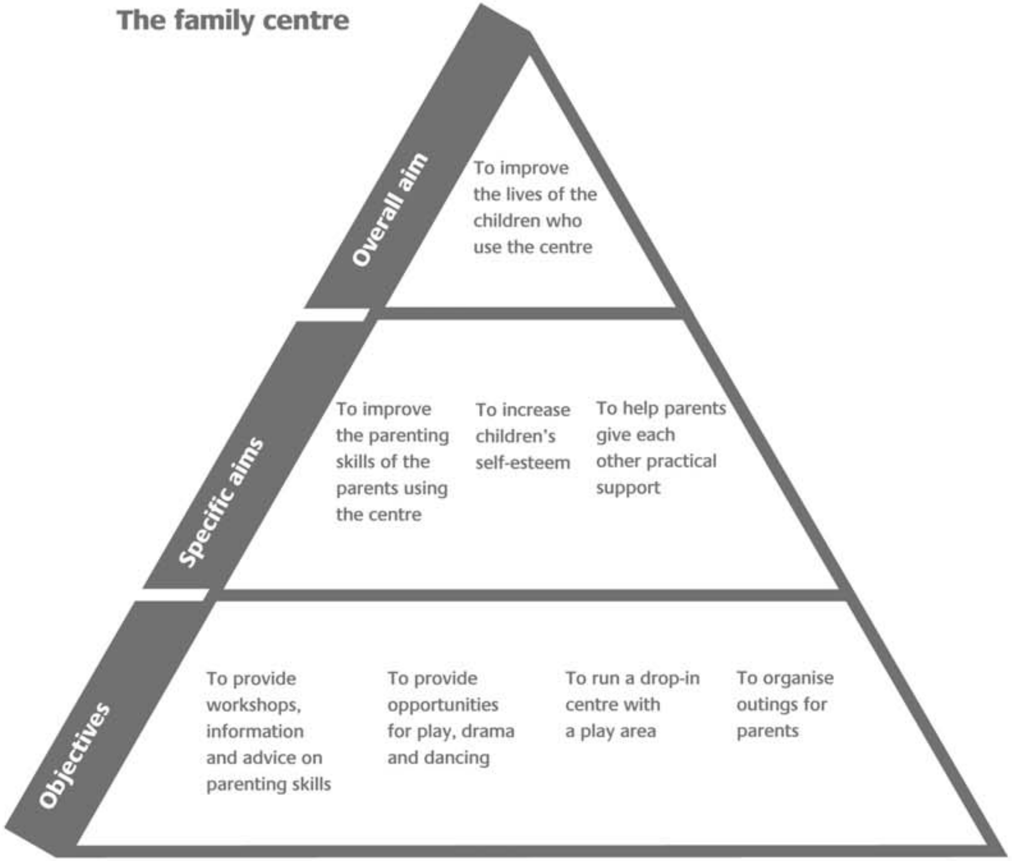
- **Be realistic.**
  Don't be over-ambitious. Make sure you have:
  – sufficient financial resources
  – enough staff or volunteers
  – enough time to run each activity.

- **Limit the number of aims and objectives and make them as focused as you can.**

Review your aims and objectives from time to time. You may find that you need to change them in the light of new information.

The triangle diagram below shows how to organise aims and objectives. It shows how all the aims and objectives of the family centre feed directly into the overall aim. We suggest that you draw up a similar triangle for your own project.

The family centre



Once you have described your project in clear statements, with an overall aim, specific aims and objectives, you will be able to move on to the next step. Step 3 will help you to decide what information you need to collect and to assess how well you are doing. It is about setting *performance indicators*.

step 3 what are your performance indicators?

Performance indicators will help you assess the progress and success of the project. There are different types of performance indicator. Here are the two types that we use in this booklet:

Output indicators help you to assess the work generated by the project and to show progress towards meeting your *objectives*.

Outcome indicators help you to assess the changes that take place as a result of your project, and show progress towards meeting your *aims*.

What is an output indicator?

Once you have set your objectives, you will be able to describe your project activities in more detail and in ways that can be evaluated. The term output is used to describe the project's activities, services and products. Outputs are the work generated by the project. You will need to identify outputs relating to each objective.

Example **Objective:** To provide workshops, information and advice on parenting skills.

The family centre identified the main outputs relating to this objective as:

- workshops
- information and advice sessions
- information leaflets.

Once you have identified outputs, you can agree on indicators for them.

Output indicators may be set for the following:

- **quantity** – the number of services you run or products you deliver
- **take-up** – the number of people or organisations who use your service or products
- **access** – the type of people or organisations who use your service or products.

Output indicators will help you answer important questions about your outputs. For example, the family centre wanted to know:

- the number of workshops and advice sessions the centre had run in a year and the number of information leaflets (quantity)
- the number of people coming to workshops and advice sessions (take-up)
- the profile of people attending, for example, their age, ethnic background and the proportion of men to women (access).

For the family centre staff, an assessment could then be made about how the workshops and the information and advice services were running.

You can ask similar questions about quantity, take-up and access in relation to each objective.

checklist

It is helpful to bear in mind the following points when setting your output indicators:

- **Be realistic.**
  Don't set too many indicators. Think about your existing workload, your financial resources and the staff and volunteers available to help you run your activities.
- **Choose the most important indicators.**
  Limit their number so that you collect only the information you need most to answer your evaluation questions.

Knowing if or how you are achieving your objectives is only half the story. It is also important to know whether you are actually bringing about the change you wanted. In the case of the family centre, are the lives of the children using the centre improved?

What is an outcome indicator?

Outcome indicators will help you measure whether you really are bringing about the change you want.

First, you need to break down your aims into all the different changes or benefits that you hope will take place as a result of project activities. These changes are known as outcomes.

Example **Aim:** To increase children's self-esteem

In order to decide on the outcomes, the family centre needs to think about what it means by 'increase self-esteem'. What different changes will show the family centre that the children have increased self-esteem?

The family centre can identify three main changes that will show this. The children would be more:

- able to make their own choices
- confident with other children and adults
- comfortable about doing things independently.

When you are clear about the outcomes you want, you can then identify indicators for each outcome. These will show you, or indicate, if changes have occurred. On the next page is a list of what the family centre thinks might happen that will show that the children's self-esteem is increasing.

Specific aim: To increase children's self-esteem

Outcomes	Outcome indicators
Children are more able to make their own choices	How often children initiate play with other children and adults
Children are more confident with other children and adults	Levels of interaction with other children and adults
Children are more comfortable about doing things independently	How often children choose to do things without their parents

Break down each of your specific aims into their outcomes and outcome indicators, working through the process shown above.

Take each of your aims and ask, 'What changes (outcomes) do we want to see in our users and what signs (outcome indicators) will show us that the change we hoped for has happened?'

checklist

It is helpful to bear in mind the following points when you are setting your outcome indicators:

- **Limit the number of indicators, so that you only collect information that will help you evaluate the project.** There is no point collecting information that you don't need.
- **Make your outcome indicators user-friendly.** Will it be easy, or even possible, to collect the information you need against the indicators you have chosen?

When you have agreed your performance indicators, you need to keep a regular check on both your output and outcome indicators to see whether you are achieving them. The next step is to collect information about them. This will help you answer your evaluation questions.

step 4 monitoring

Once you are clear about your aims, objectives and performance indicators, you can check systematically on progress. This checking process is known as *monitoring*.

When you monitor, you can collect information on a wide variety of things relevant to the project. You are most likely to need information on:

- **your outputs** – how your activities are running, and progress towards meeting your objectives
- **your outcomes** – to check the changes resulting from your activities, and progress towards meeting your aims.

Monitoring outputs

To see how they were meeting the objective '*to provide workshops, information and advice on parenting skills*', the family centre asked:

- How many workshops and advice sessions were run?
- How often were the workshops and advice sessions run?
- How many people attended the workshops and advice sessions?
- What was the proportion of men and women attending?
- Where did those attending come from?

To collect this information, the family centre used three different methods:

- A register taken at the beginning of each session showed how many people attended the workshops and advice sessions.
- A diary was used to record how often and how many workshops and advice sessions were run over one year.
- The sex and home address of each participant who attended the workshop and advice sessions were collected and entered onto a database.

By monitoring this information, the family centre could see whether it needed to make any changes in the way it was running the workshops and advice sessions. The staff discovered that fewer people attended the Friday morning workshops than the Saturday morning ones. When they asked why, they found out that the Friday morning sessions clashed with the mother and baby clinic. So they changed the workshop to a Wednesday afternoon instead.

It is important to collect information about your outputs, for example, about whether your activities are running as planned. However, you also need to monitor outcomes to find out whether the changes you hoped for have happened, and whether there are any unexpected results.

Monitoring outcomes

You may find collecting information about outcomes more difficult, as it could involve collecting information about people's behaviour and attitudes.

To collect information about whether the aim 'to increase children's self-esteem' was being met, the family centre asked several questions. Here are some of them:

- How aware were children of different options and how often did they make positive choices between them?
- Who did children talk to and play with? How often?
- How often and when did children initiate activities?
- How dependent was each child on others for different things?

To collect this information the family centre staff did the following:

- observed the children and recorded in a **log-book** when the children initiated play with adults and other children
- observed and noted in a **log-book** the levels of interaction with adults and other children
- asked the parents, using a **questionnaire**, whether they thought their children chose to do more things without them over a period of time.

The log-book showed that most children did initiate play with adults and other children more often the longer they came to the centre. The feedback from the questionnaires filled out by parents showed occasions when the children still relied on them. It also showed that many children became increasingly comfortable about talking and playing with other children and adults after spending some time at the centre. There were differences between individual children.

checklist

It is helpful to bear in mind the following points when you are deciding how to collect monitoring information:

- Think about ways of collecting information that will fit best with your project.
  - You may want to collect information by carefully observing your activities. The family centre staff observed the children's behaviour when they were playing to see whether any changes occurred over a period of time.
  - Asking questions: You could use a written questionnaire or hold group or individual discussions to find out whether any changes have occurred.
  - Using records: You could use log-books, registers, databases, case notes or diaries to collect and record information.

  Try to think creatively of other ways of collecting information.
- Be clear about who will collect each piece of information and when to do it.
- Make sure you explain to people collecting information why they are doing it and how you will use it.
- Make sure that monitoring records are completed fully and accurately, and stored safely and confidentially.
- Once your system functions well, write it down and make it part of your project procedures.

When you have collected the information about each of your aims and objectives, you will need to look back and make judgements about your project. Step 5 is about *evaluation*.

step 5
evaluation

Evaluation is about making sense of the information you have collected and making a judgement about your project.

The work you do when you carry out the first four steps will help provide a basis on which to make informed judgements. You will have:

- **clear aims** – the changes you want to see
- **clear objectives** – the activities you carry out to bring about the changes
- **output and outcome indicators** – guiding you on the information to collect to make judgements
- **a monitoring system** – to collect relevant information.

You can use the information you collect to help you answer the following questions:

- Did the project achieve its aims? Did it make the changes you hoped for? If your project did not achieve its aims, why not?
- Did the project achieve its objectives? Did its activities run as planned? If not, why not? What worked well and what not so well? Did you reach your target group?
- What else have you learnt from the evaluation? What else has it told you, for example, about the way the project works, your management support, staffing and other resources?

Take time to consider what the information is telling you. The answers to these questions will feed into your planning process, helping you to identify the developments you want to make to future work plans.

Remember also to learn about how your monitoring and evaluation worked. Think about how you might do it differently next time, if necessary.

Reporting the results

How you share and use the results of your monitoring and evaluation is very important. Think about who would be interested in the results and how that information should be reported.

You are likely to need a written report for your funders. However, there may be many other people interested in the evaluation, such as your users, your trustees, staff and donors. So take these different groups of people into account when thinking about how to report your evaluation.

As well as a written report, think creatively about other ways of reporting information. Here are some ideas:

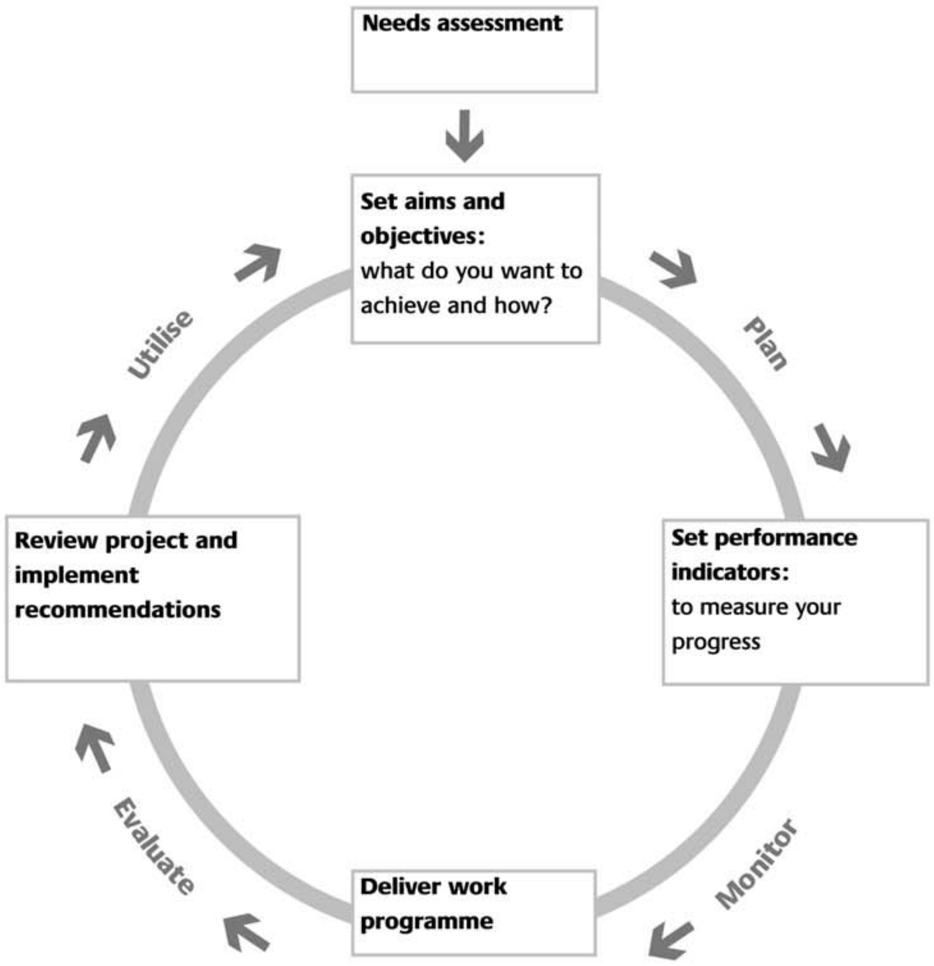
- annual reports
- training events
- conferences
- meetings
- videos
- newspaper articles
- radio interviews
- your website
- newsletters.

When you are deciding on how to report your results, think not only about who your audience is, but also about how you want to use your evaluation findings. Remember that evaluation is meant to be used.

the self-evaluation cycle

Once you have carried out all the five steps of the self-evaluation process, you will have reported your evaluation findings. However, the process should not stop there. Most important, you now need to agree how to feed back your learning into your daily work and the project's future development.

The cycle of self-evaluation on the next page shows how evaluation should be a continual process which is built into your annual work plan. This will help your project to remain healthy and to provide services that are of the highest quality. Above all, it will help the work you do make a **real difference**.



Now that you have reached the end of this guide, you may want further guidance. *Practical monitoring and evaluation: a guide for voluntary sector organisations* is also published by CES. This has been designed to take you from the first steps through to a more advanced level of evaluation. It includes a practical toolkit with guidance on collecting and analysing information, and writing reports.

about
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Charities Evaluation Services (CES) is an independent charity with unrivalled expertise in monitoring, evaluation and quality assurance systems in the voluntary sector.

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