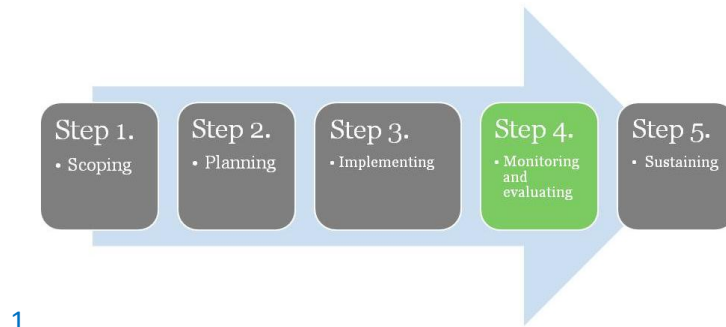


Step 4. Monitoring and evaluating your project

Collecting data, communicating results, writing a report



1. Introduction

In the previous step, you implemented your plan with modifications if unexpected situations arose. In this step, you will monitor your project's progress, evaluate the outcomes at points along the way and, during and at the end of the project, report back to stakeholders.

This step expands on the basic monitoring and evaluating plan that you developed as part of your project plan in Step 2.

Some key terms that are used in this step are:

- **Monitoring** is collecting and analysing data as you go in order to keep track of the project.
- **Evaluating** is using all the data that you have collected along the way to judge how successful or effective your project has been. It is about assessing if the objectives/outcomes/asures of the project have been achieved.
- **Reporting** is about communicating to stakeholders on the progress of the project and any results from monitoring and evaluation studies

2. Rationale

Many Rotary projects in the past have been conducted **without** monitoring and evaluating by often well-meaning people for the very reasons that we all joined Rotary; “to do good in the world”. Unfortunately, this is still happening today. However, unless you monitor and evaluate your project, you cannot judge if you have been successful in delivering what you said you were going to do, you have no real means of identifying if things are not working out and if you should change direction, and you have no real way of informing all the stakeholders involved in your project if it really did any “good in the world”.

Of course, monitoring and evaluating takes time, effort and, in some cases, money, but it is essential that it is done. Here are some reasons for doing so:

1. Collecting data along the way will help you to assess how your project plan is working and will give you results that you can communicate to the stakeholders.
2. Monitoring the project could also raise flags that something is not working and that you may have a problem that will need to be addressed. Often identifying an issue or problem early

in a project can prevent it from escalating into a full blown crisis that can threaten the whole project.

3. Monitoring could even provide data that might be a trigger to either change direction or even stop the project all together. Having this kind of negative data is still worth communicating to stakeholders, as it may prevent others from making the same mistakes with their projects.
4. Producing an evaluation report, either as interim reports or as a final report, will provide evidence that your project has been successful and has delivered the outcomes you expected
5. Data and evaluation reports can provide evidence that the project has been successful and could be used to establish your and your club's credibility should you wish to repeat the project, scale it up or even apply for funding for a different project.

3. *Developing a plan*

Some key questions

Below are some key questions that you might consider as you are developing your monitoring and evaluating plan:

- *What are you trying to achieve for this project and what are its targets?* (e.g. go back to your strategic plans for your goals, strategies and targets)
- *How will you establish the baseline level for your project?* (e.g. the number of trees above 3 m on the property on which you are planting trees, a bird species count)
- *What public records could you use as measures for your project?* (e.g. quality of water in water catchment areas, population records, morbidity and mortality rates, infant mortality rates, literacy or numeracy rates, average household size, number of homes with access to electricity or clean water,)
- *What other project specific information will you have to collect to measure the effectiveness of your project?* (e.g. the number of homes or schools provided with solar energy units and the number of these units still operating after three years)
- *Who will collect the data for your monitoring and evaluating?* (e.g. volunteers on your team, external, but voluntary experts, paid evaluation experts)
- *Who will analyse the data and prepare reports?* (e.g. the same options as the previous question)
- *Considering all your stakeholders, who will you need to report to and how will you do this?*
- *Where can you go to for help?* (e.g. a member of your club who is experienced in project management, your District community or international service leader or The Rotary Foundation Chair. An excellent source of information on monitoring and evaluating is The Rotary Foundation document called: *Global Grant Monitoring and Evaluation Plan Supplement*.)

Preparing your plan

Sample monitoring and evaluation plan

Below is a sample plan for one of the project goals of the Tree Project

Goal	Measure	Target	Method	Schedule
The broad aims of the project	A brief description of what you're planning to count or assess	Precise, numerical valued and time-based outcome	How you will obtain the data for this measure	The timeline for collecting this data
1. Contribute to Landcare's efforts to boost nature corridors and reduce salinity and soil erosion by sowing, growing and planting native seedlings in western Victoria	Total number of beneficiaries	At least 50	Project records	Counted at the end of the planting day
	Number of seedlings raised and planted	At least 1,500	Project records, estimated from total number of seedlings raised less those planted on the day	Counted at the end of the planting day
	Number of seedlings surviving after three years	At least 50% survival	Landholder's estimate	At the end of each planting event
	Number of members from Landcare involved with the selection of a suitable property and attending the planting event	At least 1	Project records	Counted at the end of the planting day

4. Tips for success

Below are some tips for success when monitoring and evaluating:

- After conducting an event on one day or over a few days, try to get your team together for a quick debrief. A simple debriefing tool is a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats). An alternative and less confronting approach is to look at:
 - What worked?
 - What didn't work as well?
 - What could we improve?
 - What will we do next time?
- Make sure that any measures you use apply specifically to the project goals and targets. Try to keep your measures simple so that you are not spending onerous amounts of time on gathering data.
- Use computer software to organise your data. If you are comfortable using Microsoft Project Manager, use that for your monitoring and evaluating as well. If not, set up worksheets in Microsoft Excel. (One Rotary club runs annual leadership training programs for young professionals. Each year they distribute evaluation forms to each delegate and then enter the data into prepared Excel worksheets. They are then able to compare results from the current year to previous years and look for any trends. It's a quick process that takes no longer than one hour to complete.)
- Use the results of your monitoring and evaluating to provide reports for your stakeholders. Try to keep the language and length of your reports, appropriate to your audience. Providing visuals (e.g. graphs and photographs) always makes a report easier to understand.

Activity 6.

Prepare and commence your monitoring and evaluating plan.

5. Extra help

Where to go for extra help (District and Rotary International)

- Global Grant Monitoring and Evaluation Plan Supplement [website](#)

6. Links

Other documents and templates:

- Department of Environment and Conservation NSW. (2004). *Does your project make a difference? A guide to evaluating environmental projects and programs*: Department of Environment and Conservation (NSW).
<http://www.environment.nsw.gov.au/resources/communities/040110-Project-Evaluation.pdf>
- [Planning for Success Sample Strategic & Action Plans](#)

- Sample Monitoring and Evaluation Plan
- Monitoring and Evaluation Template

7. Summary

In this chapter, you will have considered:

- how to produce a workable monitoring and evaluation plan
- how to put this plan into practice
- how to report to stakeholders and how often

In this step, you should have produced a:

- A monitoring and evaluating plan for your project

When completing the section on monitoring and evaluating for a The Rotary Foundation Global Grant, you could use the planning document produced for Step 4 of this Guide to prepare a Monitoring and Evaluation Plan required by TRF. This later plan requires you to complete a table with the following headings:

- Measure (what you are measuring for a particular Area of Focus, e.g. Total number of beneficiaries)
- Definition (whether a Rotary Foundation standard (listed as options in the Monitoring and Evaluation Plan Supplement) or a project specific measure)
- Target (numerical value expected e.g. 50 volunteers)
- Method (how the data will be collected (listed as options in the Monitoring and Evaluation Plan Supplement) e.g. from specific project records)
- Schedule (timeline to collect the data, e.g. on the morning of the event)