

Monitoring and evaluation framework checklist

“When the cook tastes the soup, that’s formative; when the guests taste the soup, that’s summative.” Robert Stake (2004)

The big idea

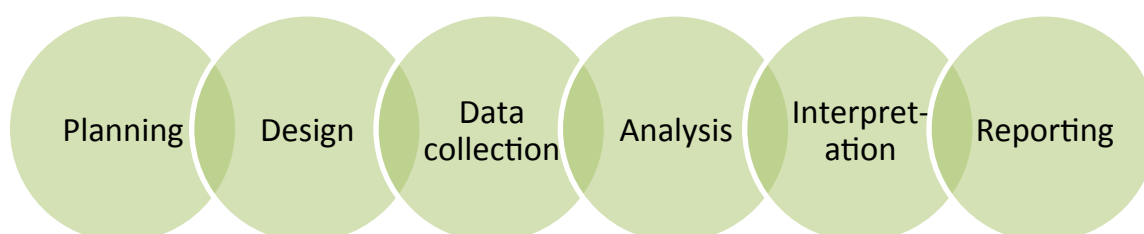
Monitoring and evaluation should be a core concern of any business. But in many cases it has been seen as an externally imposed necessity rather than an integral part of any activity. The focus has become ‘measurement and efficiency’ rather than ‘effectiveness’. Embedding a culture of monitoring and evaluation can provide support for:

- Learning and continuous improvement
- Planning
- Decision making
- Providing evidence of achievements to stakeholders
- Setting standards

Purpose

The purpose of this tool is to provide you with a framework for assessing your monitoring and evaluation. It outlines some of the key elements and stages in the evaluation process and gives a view of expected practice.

Figure 1 Six stages of evaluation



The tool

	Yes	No	Comments
Pre-implementation (planning and design)			
Have you identified the impact you intend to have – the changes you want to see as a result of the activity?			
Have you identified the intended outputs and outcomes?			
Have SMART objectives been established for the activity?			
Have performance indicators been established?			
Has a starting baseline been established?			
Has a task timeline been established to show what needs to be done to achieve the outcomes?			
Has the nature of the data needed been identified?			
Have the sources of data been identified?			

	Yes	No	Comments
Have the methods of data collection been agreed?			
Have appropriate analytical methods been agreed?			
Have you identified who will collect the data?			
Have milestones been established for the activity?			
Have regular points for review been agreed?			
Have the input costs been determined?			
Implementation (data collection and analysis)			
Have the evaluators been appointed (either internally or externally)?			
Has a contingency plan been agreed?			
Has the evaluation plan been distributed and communicated?			
Are the inputs being monitored?			
Are the outputs data being monitored?			
Are the outcomes data being monitored?			
Are the key milestones being monitored?			
Is the data being checked for accuracy and reliability?			

	Yes	No	Comments
Post-implementation (interpretation)			
Have the outcomes data been compared with the baseline?			
Has the cost-effectiveness of the activity been analysed?			
Have the total activity costs been calculated?			
Have any appropriate comparators been examined?			
Have any wider trends or environmental factors been examined which may have had an impact on the activity?			
Reporting and dissemination			
Has the format for reporting been agreed?			
Has the audience for the reporting been agreed?			
Have the needs of stakeholders been identified and taken into account?			
Have the results fed back into any future activity?			
Have any wider dissemination channels been explored and/or used?			
Has a final report been produced?			

Take the next step

Think about a personal activity you have recently undertaken. It might have been decorating a room, buying a new TV or taking a holiday. Think about the outcomes you had in mind for that activity. How might you have designed an evaluation process

for the activity? Did you achieve your outcomes? What were the unintended outcomes? What impact did it have on you?

Top tips

- Pay particular attention to the pre-implementation phase to ensure monitoring and evaluation is an integrated part of your business activity
- Remember there are qualitative and quantitative methods. Make sure you choose an approach that is appropriate for your activity and your organisation
- There are a number of organisations that provide advice, information and guidance on different forms of evaluation – [National Council for Voluntary Organisations](#), [Charities Evaluation Service](#), [New Economics Foundation](#), [New Philanthropy Capital](#)
- Work with your beneficiaries and stakeholders to ensure your evaluation reflects a variety of perspectives

References

Stake, R. Cited in Earl, L. 2004 *Assessment as Learning: Using Classroom Achievement to Maximize Student Learning*. Experts in Assessment. Corwin Press Inc: Thousand Oaks, California