

## THINK

About who is running the evaluation process and whether it enables both communities to contribute equally.

## REFLECT

Consider what has happened over the period under review. Celebrate the good and look at the lessons to be learned.

## QUESTION

Have you taken into account that your partners may feel reluctant to answer openly in the reviewing process for fear of giving offence?

## Checklist:

- ✓ Which questions do you both most want to address?
- ✓ What evidence do you both need to collect to see how you are doing?
- ✓ How can you both collect evidence for this?
- ✓ Have you agreed a variety of methods, quantitative and qualitative, to obtain the information?
- ✓ Have you carried out a baseline study against which to measure future progress?
- ✓ Have you agreed a timetable to monitor and evaluate the progress of the link that everyone knows?
- ✓ Have you agreed how the information will be used?
- ✓ Have you collected reliable and relevant evidence, with numbers if possible?
- ✓ Have you established a plan for the next phase that can incorporate any recommendations?
- ✓ Is your plan flexible enough to enable you to refocus or redefine your aims?
- ✓ Are you all still enjoying working together and are you still having fun?

## Next steps:

- Consider what you are both trying to achieve.
- Consider how you are going to measure it.
- Draw up an agreed plan.
- Gather materials for a baseline study, or audit, at the beginning of your link.
- Agree a variety of methods and techniques for collecting evidence.
- Ensure information gathered from a range of participants, with different levels of involvement, over a period of time.
- Ensure everyone has the necessary opportunities and resources for this.
- Remind yourselves of the agreed intended outcomes.
- Compare these with what you have done.
- Review how it has gone.
- Explore what has been learned.
- Decide what to do next.

# TOOLKIT

For Linking: Challenges and Opportunities

### Monitoring and evaluation

Monitoring is the tracking of an activity to ensure that it remains on course. Evaluation is the review of an activity, which allows us to check that it is producing the desired outcome.

Evaluation can be quantitative or qualitative. **Quantitative evaluation** is objective, producing numerical data and giving a sense of scale.

**Qualitative evaluation** gives a sense of what really happened. It is harder to measure as it focuses on more subjective data such as thoughts, opinions, ideas, attitudes and feelings.

Evaluations fall into one of two categories:

**Formative** evaluation provides information that is necessary for the planning and management of a project. It provides information needed to describe the project in action and identify possible problems.

**Summative** evaluation is generally carried out after a programme has been completed and concerns the effectiveness of the whole project. 'Summing up' a project is easier if an initial assessment, or baseline study, exists against which change can be measured.

Evaluation requires thinking and planning ahead to ensure that all relevant information can be recorded and accessed. Everyone involved in a project or initiative should be involved in evaluation.

Partners and participants can monitor and evaluate participation, empowerment and progress towards joint goals.

Why monitor and evaluate your link? Because cross-cultural linking can lead to misunderstandings and miscommunications, we need to monitor and evaluate our links in order to find out what works, what doesn't and why, so that we can address problems that have arisen and learn from our actions. Developing a framework for evaluation through consultation between both partners, early in the process, will enhance and strengthen the link and ensure that resources are used effectively.

Different groups will have different views on the aspects of linking they wish to evaluate, for example, attainment of various aims and objectives; standard of work or outputs; contribution of linking to wider community or initiative; participant satisfaction; efficiency or value for money and use of S.M.A.R.T objectives (see overleaf).

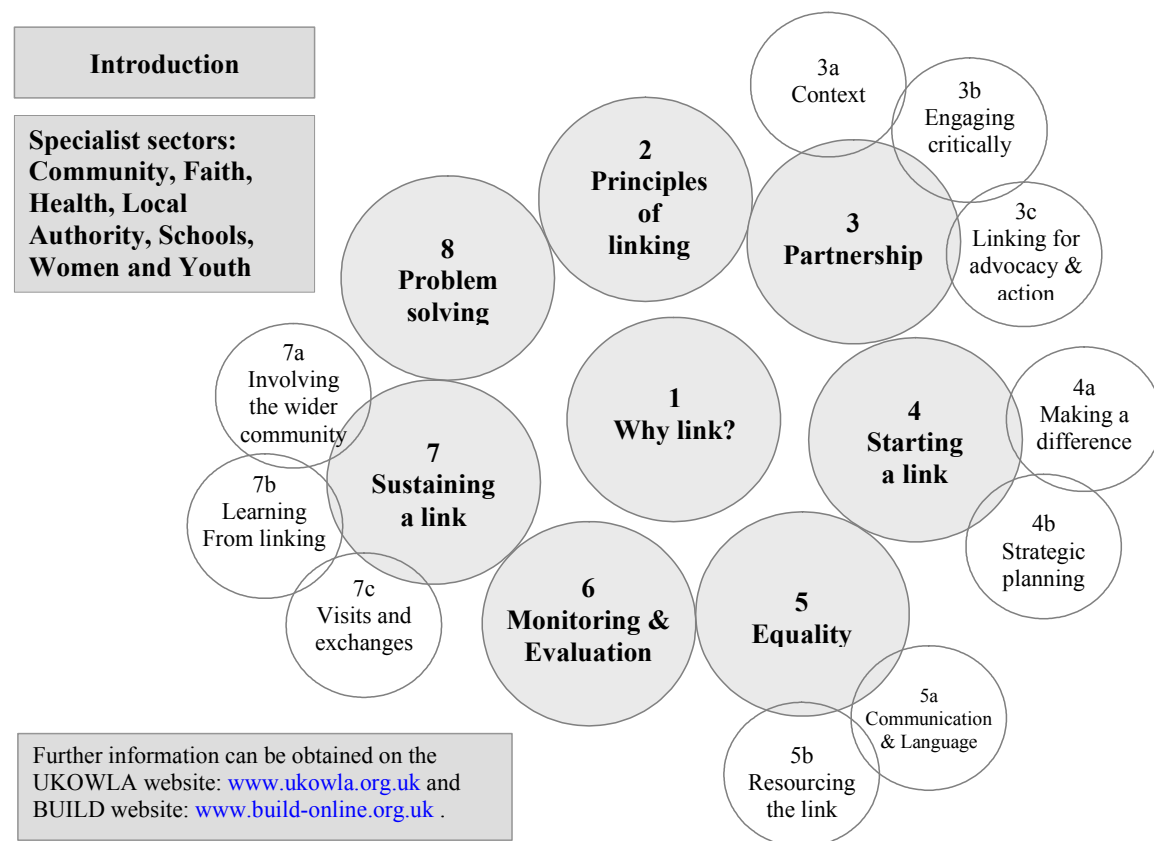
Evaluation enables us to share what we have done and to be confident of its value, make lasting changes, be accountable and show what use we have made of any resources we have been given. All links have to be accountable whether to our partners, funders or our community. Linking is not an isolated activity.

Whilst the benefits for one community may seem clear, the partner community may not benefit in the same way. We need to consider what difference linking is making in terms of changing people's lives, attitudes, skills and behaviour. Impact assessment, simply defined, is the process of identifying the future consequences of a current or proposed action. Measuring impact is not an easy task; it is difficult and time consuming. It requires a 'baseline' study to measure the relevant factors at the start of the link so that changes can be tracked over time.

Evaluation should lead to open and honest debate on the issues within the link, which do not always seem apparent on the surface. And it is these hidden elements which can hold the key to success. Cultural assumptions by both partners need to be identified and challenged. If everything appears to be all right then it is likely that the right questions are not being asked. Thorough evaluation can bring those out.

Evaluation is an essential part of an effective link, and careful planning at the start should help you both get the right amount of information when you need it. Regular progress reports and record keeping should help keep track of progress and enable unexpected developments to be addressed. There should include measures of impact looking at attitudes, skills and behaviour to see the difference the activity has made in terms of changing peoples lives. Don't be afraid to admit that there are less successful, as well as, successful elements to the link. Build on the successes and learn from the areas which have not worked so well. Record and share your findings; build them into your future plans and use the opportunity to raise awareness of your link and involve others.

### Toolkit for Linking leaflets



## What others say

Much more must be done to recognise the value of people as a resource, especially in evaluating the 'Southern' contribution to aid projects and in link relationships.

*A celebration of linking, UKOWLA*

Who does the evaluating – the Southern or the Northern partner? In most partnerships, the answer seems to be 'those who pay, ask the questions'. *S-N partnerships*

Are the Northern organisations setting themselves different criteria for the Southern organisation than they would set themselves? *S-N partnerships*

Mistakes are a fact of life. It is the response to the error that counts. *Nikki Giovanni, Italy*

One of the often-unseen problems relating to South-North partnerships is the lack of acknowledgement and recognition by either of the partners of the demands and pressures that may be affecting the other's performance.

A thinker sees his own actions as experiments and questions - as attempts to find out something. Success and failure are for him answers above all. *Friedrich Nietzsche, Germany*

We must not say every mistake is a foolish one. *Cicero, Italy*

I hear, I know. I see, I remember. I do, I understand. *Confucius, China*

The **SMART** objectives are helpful:  
**Specific:** Clearly described and defined.

**Measurable:** Clearly defined means of measurement.

**Achievable:** With the skills available in current environment.

**Realistic:** Attainable with current knowledge.

**Timebound:** Limited by dates based on real and known needs.

## Collecting the evidence from individuals and groups at both ends of the link

### Diaries and journals

Can provide evidence of change during the project. They can be helpful for jotting down thoughts as they occur.

### Graffiti wall/comments boxes

Provide some guidance/structure to assist with collation and interpretation of responses  
Keep the questions simple

### Participatory techniques/activities

For example: drama, drawings, charts and diagrams  
Focus on particular aspects of change  
Combine these with other methods and sources of information. Be aware of power relations in the group.  
Plan in advance  
Repeat the activity at different times in your project

### Video/video diaries

Make sure the purpose of filming is clear to everyone  
Provide a structure or set of questions as a guide  
Record date, time, place and names

### Case studies

Keep it simple  
Don't collect too much  
Think carefully what information they need to include  
Try to use a common format

### Review meetings and group discussions

Need to be well structured. Small groups work best 6-8 max. Notice who doesn't participate and seek their views. Keep a balance: men/women, old/new people, children/adults. If you can, find an independent person to be a facilitator.

### Questionnaires/Evaluation Forms

Think carefully how you will use any information you collect.  
Do pilot any materials first  
Don't make them too long and work out how long they will take to complete  
Only ask what you really need to know  
Don't ask leading questions  
Include tick boxes or grading that can be circled  
Include space for open-ended comments  
Test out your questionnaire first

### Interviews

Think and plan beforehand how you are going to use the information  
As the interviewer: try to ensure that you don't influence responses  
Use open questions i.e. ones that can't be answered with yes or no  
Choose your sample carefully to be representative  
Have a structured set of questions and keep to it  
Make notes at the time

### Audiotape

Similar to video but cheaper and less disruptive and intrusive  
Have a small tape recorder or dictaphone on hand  
Keep it brief to avoid problems with transcription

### Direct observation

Have a clear structure to focus comments  
Participants could observe each other

### Photography

Plan carefully what you are going to photograph  
Take the photos at significant points in the project  
Don't forget to record details of who or what you are photographing and when

**Note:** Good evaluation procedures may lead to greater support from funders, who may also be interested in assisting with the process. Many grant-giving bodies will require you to set out your evaluation plans before they will give you a grant.

## Different means of evaluation

### Indicators:

Indicators are things that can be measured to see how far aims and objectives are being met. You may need to use different indicators at different stages in the partnership. They may be:

**Process** measures of implementation agreed in the plan, ensuring planned activities are being carried out effectively. eg: effective consultation, extending reach and increasing partnerships, numbers of sessions or events held.

**Outcome**, or impact, measures of the extent to which the original objectives have been achieved. Assessing progress towards reaching objectives and the impact on those affected by the link. eg: increases in self esteem, improved skills, raised educational achievement, greater involvement.

### EXAMPLES (to be added)

### VISIT REPORTS: one example

Visit reports are a vital resource to help assess the impact of the link and inform future visits. Reports are needed to ensure that link developments build on past work and to report to funders should you need to do so.

### VISIT REPORTS: what to include

- What activities were carried out during the visit?
- Were the visit objectives met?
- Was there a good relationship with the partner institution?
- What changes were noted since the last visit?
- Has anything new been implemented?
- What could be improved upon in future visits?
- What are the plans or suggestions for the future?
- What recommendations can you make?

Taken from Links Manual Tropical Health and Education Trust (THET)